DEALERS SEE DIM PREVID PICTURE

Merchandising

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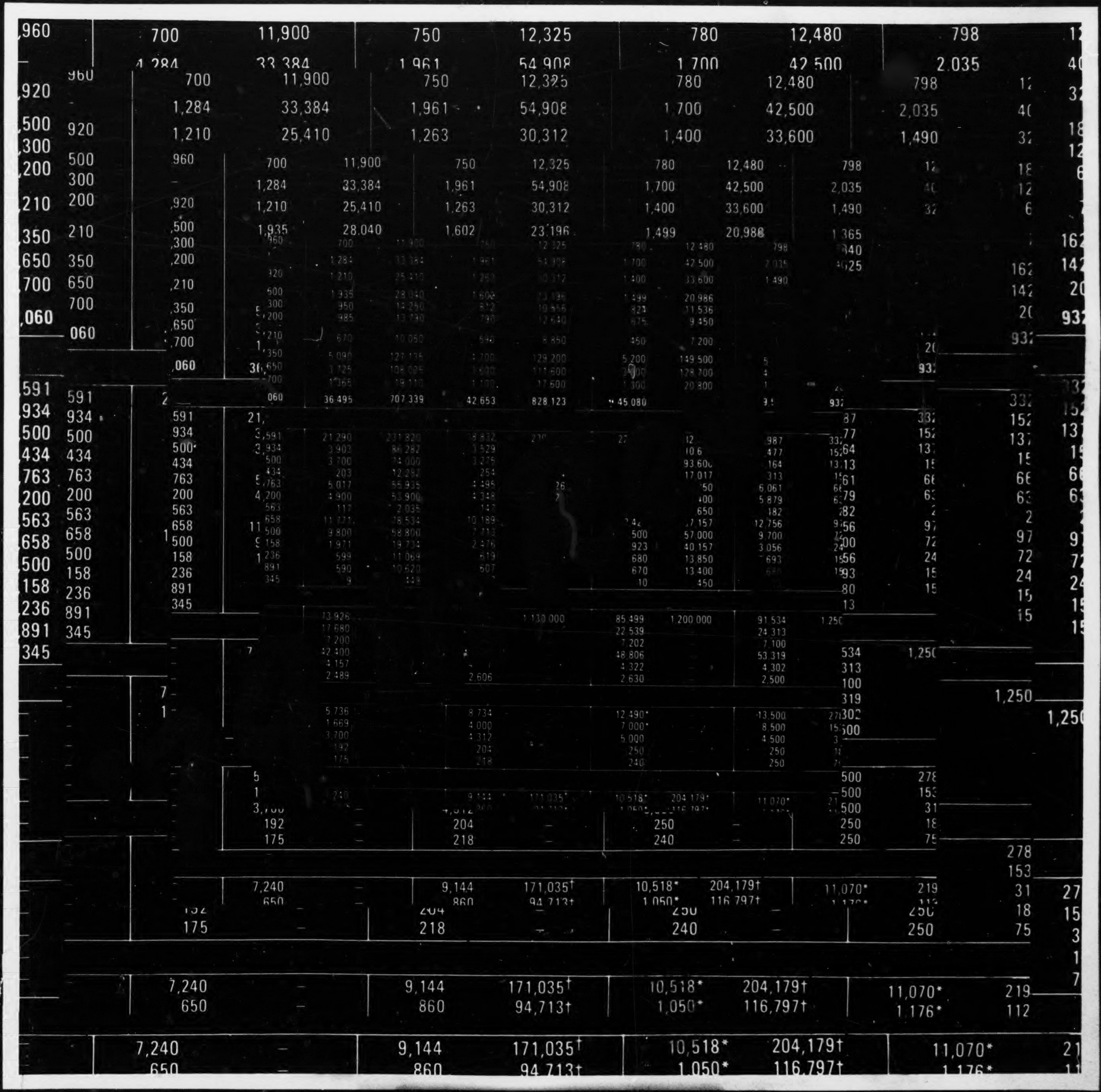
58th Annual S[illegible] and Market[illegible]



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Formerly Merchandising Week

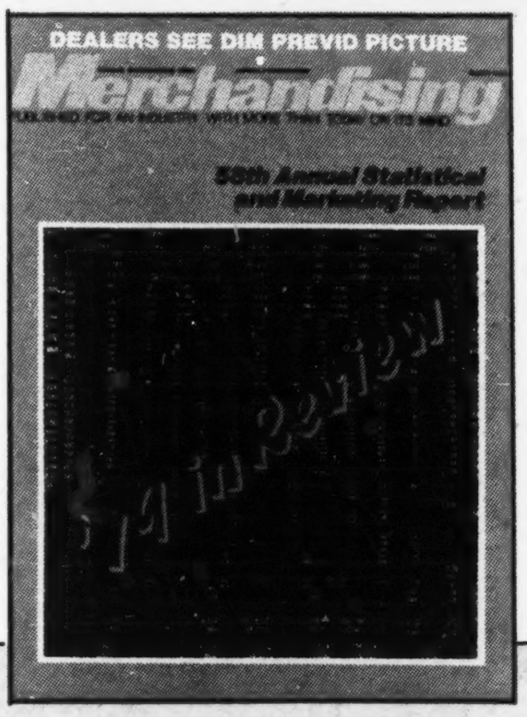
Merchandising

PUBLISHED FOR AN INDUSTRY WITH MORE THAN TODAY ON ITS MIND

FOR OVER 60,000 READERS
51,000 RETAILERS

March 1980

58th Statistical & Marketing Issue


DEALERS SEE DIM PREVID PICTURE
Merchandising
58th Annual Statistical and Marketing Report
'79 in Review

19

This is *Merchandising's* 58th annual Statistical Issue & Marketing Report to the housewares, major appliance and consumer electronics industries.

As in the past, our editorial staff has added a few products to our statistical data gathering program, dropped some of the previously published data which we believe is no longer useful to our industries, but the final result, we think, is an improved package of vital information to be used as a year-round tool for better merchandising and marketing.

Contributors include editors Ron Schneiderman, Fred Gottesman, Lois A. Panosh, Jack Blood and researchers Fern Milman and Selma Book.

Retailers Take Dim View of Previd

8

Videotape recorder sales are growing at a good clip and the prerecorded videocassette market is blossoming, too. Nevertheless, many merchants hold a dim view of the prerecorded software business, this month's RETAIL OPINION FILE finds.

They express general confusion, while many others see the outlook as murky, and that making any substantial commitment to this particular market is, at least at this time, premature.

Rack Jobbers Poised for Previd Market

73

Rack jobbers, pushed perhaps by the need to make up for lost record sales and profits, have begun to speed up their plans to get into video software markets. Some are still test marketing, taking the cautious road. Others have decided to jump right in and have already begun to sign on retailers who are happy to get the help, even if they have to share the profits.

As one rack jobber put it, "It's an excellent opportunity for us."

From the Capital

6

The Federal Trade Commission has always had a major impact on retailers, and that's why the drubbing that the FTC is taking from Congress will affect the way merchandise is promoted, sold, and paid for in the years to come.

Product Picture

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- NARDA: Computerized retail index shows white goods sales in '79 did better than brown goods...................109

Trendings

10

- February promotions keep color tv and VCR sales perking, especially in Northeast.
- Compacts, better prices on separates, and metal tape decks supply helpful mini trends in audio.
- Many dealers say non-video games aren't for everyone despite booming sales.
- While margins are a matter of concern, electric housewares buyers are pleased at sales pace.
- Glassware challenges and excites non-electric housewares merchants.
- Heavy promotional thrust keeps major appliance volume close to last year's levels.

Store Operations / Display

80

Video specialist, on deadline for a new store opening, found custom store designers couldn't meet timetable so he went to a modular display house. Result was a package that provided image, flexibility and reasonable cost . . . and on time.

Energy vs. Prices

71

Based on what the appliance industry knows today, minimum energy efficiency standards will probably increase the cost of many of its products beyond the levels attributable to inflation alone.

But that's just one of the industry's concerns, as we discovered at a recent energy seminar.

PULSE: Snow Throwers

104

Snow or no snow, retailers are reporting record sales of snow-throwing equipment in certain parts of the snowbelt. Remembering the blizzards of 1978-79, most sales came in September and October, helped along by a variety of pre-winter promotional programs.

Coming in April

- ★ *How competitors live in K mart's shadow*
- ★ *ITA Video Seminar*
- ★ *Store Operations: Meeting the energy crunch*

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Retail Opinion File

Prerecorded video picture blurred for many retailers

Questionnaire

Do you sell prerecorded videocassettes?

Yes	15%
No	85%

If "yes" to above, how many titles do you currently carry in inventory?

5 or less	21%
6-10	14%
11-25	17%
26-50	15%
51-100	18%
Over 100	15%

What change do you expect in your inventory position in 1980?

Higher	65%
No Change	29%
Lower	6%

Who has responsibility for selecting your prerecorded videocassette titles?*

Store owner	44%
Store manager	36%
Sales manager	8%
Buyer	23%
Rack jobber	3%
Other	3%

**Adds to more than 100% due to multiple answers*

What percentage of your titles do you return or exchange because they are slow sellers or non-sellers?

None	55%
1-5%	14%
6-10%	11%
11-15%	5%
16-20%	9%
Over 20%	6%

What percentage of your advertising budget went to prerecorded videocassettes in 1979?

Less than 1%	63%
1-5%	23%
6-10%	9%
Over 10%	5%

What change do you expect in this percentage in 1980?

Higher	61%
No Change	33%
Lower	6%

Are you satisfied with the profits from your prerecorded videocassette sales?

Yes	46%
No	54%

Have your prerecorded videocassette suppliers told you whether prices will change during the next 6 months and if so, how?

Higher	15%
No Change	8%
Lower	11%
No indication given	66%

Do you sell videocassette recorders?

Yes	95%
No	5%

If "yes" to the above, what is the average number of prerecorded videocassettes you sell with each VCR sale?

None	45%
1-2	47%
3-4	8%

Do you sell X-rated prerecorded videocassettes?

Yes	59%
No	41%

If you don't sell prerecorded videocassettes, why not?*

Too costly to stock	44%
Not enough profit	14%
Not enough display space	15%
Don't like titles currently available	14%
Other	33%

**Adds to more than 100% due to multiple answers*

Videotape recorder sales are growing at a good clip. Helped along by strong promotions and the addition of hundreds of new titles recently, the prerecorded videocassette market is blossoming, too, according to most reports.

Nevertheless, many merchants hold a dim view of the prerecorded software business, this month's Retail Opinion File finds.

Apart from evidence of lots of generalized confusion among some dealers, many others feel the outlook is murky, and making any substantial commitment to this particular market is, at least at this time, premature in their judgement.

For one thing, only 15% of those retailers who replied to *Merchandising's* current poll are currently selling prerecorded videocassettes. Yet, a whopping 95% of the respondents sell VCRs.

Some of the reasons given by dealers for not carrying any prerecorded product sound like an indictment of the industry:

"No one has ever approached us. Our inquiries get only some literature in the mail; no follow-up," complained one retailer.

"We'd like more information, but nobody has come to us with a program," charged another.

In addition to noting apparent lack of communication from suppliers, other retailers cited more practical, if local, reasons for not stocking prerecorded videocassettes.

Said one merchant, "There aren't enough (VCR) machines in our market to warrant stocking tapes. The demand isn't big enough yet to justify the risk."

Then, there's the age-old complaint: "Not enough margin to make it worthwhile. There's no use being in an unprofitable business."

Another familiar cry was, "Too many discounters are selling the product at ridiculous prices." Or as still another retailer protested, "Not with a biggie like Fotomat getting into the act."

Perhaps more pertinent was the response of several dealers who gave as their reasons for avoiding prerecorded videocassettes, "It's too expensive to stock with the need for both Beta and VHS. I'll reconsider when there's a single format."

Another reason given for their hesitancy was the impact of the videodisc on the prerecorded videocassette market.

"I feel the videodisc will virtually eliminate the need for prerecorded cassettes," said one. And another dealer predicted, "With the introduction of the RCA videodisc, the customer is going to be as confused as was the case with quad sound. It'll be another Edsel."

But even among those retailers who currently carry prerecorded videocassettes, there is a measure of confusion as well as complaint. For one thing, 67% of the respondents said they stocked 50 or less titles, and 21% noted they carried a mere five or fewer titles.

As to why so few titles, a common reply was, "I just can't get a handle on what titles to stock. I'm afraid that unsold stock could wipe out any profit on what was sold."

Still, 65% of respondents to the survey asserted that they were planning to expand their inventory position this year, and only 6% said they'd decrease their stocks. And by way of confirmation, dealers insisted, "We need more titles—more sports, newer movies."

And many of the dealers currently carrying prerecorded videocassettes expressed a measure of optimism about the product's potential. Although 63% admitted to spending less than 1% of their advertising budget in 1979 to promote prerecorded software and another 23% spent 1-5%, 61% said they were scheduling budget increases this year. Only 6% planned to reduce their ad effort.

Of course, some of these same retailers who were boosting their ad expenditures also complained about what they considered was a lack of advertising support from their suppliers.

An even more tender subject with many dealers, however, is the issue of returns. "We need better return privileges" was an oft-repeated comment. And many retailers indicated a key reason they didn't stock more titles was their fear of being stuck with slow- or non-sellers.

To the question of "what percentage of your titles do you return or exchange because they are slow sellers or non-sellers," a very substantial 55% of the respondents replied "none." Another 25% said they returned or exchanged up to 10% of their titles. Twenty percent noted returns or exchanges on over 10% of their stocks.

Profitability is another concern of stores carrying prerecorded videocassettes. Only 46% of the respondents to this survey said they were satisfied with their profits on the product. Coments, however, suggest that the 54% who are not satisfied are not talking only about margins. As one dealer said, "For the investment involved, turnover is very slow."

The X-rated videotape is another problem area for many merchants. Although 59% of the retailers answering this poll carry X-rated material, many are not happy about it.

"Porno is selling two to one over other tapes," stated one dealer, "even though we don't advertise X-rated and we keep it out of sight."

Another said he solved both the X-rated issue and the expense of carrying an inventory. "We special order only. With delivery in only four or five days, we see no reason to stock tapes. Another thing," he added, "75% of our sales are in X-rated and we wouldn't stock X-rated stuff anyway." Still another dealer who also used the special order route noted, "We can make a better margin and without the cost of inventory."

And finally, retailers had lots of advice for prerecorded videocassette suppliers:

Said one, "The small dealer is at a disadvantage when it comes to sources. We need rack jobbers." (See related story on p. 73.)

"We need better-designed display racks for both blank and prerecorded tapes," noted another.

"The quality is poor," commented still another retailer. "We'd like to see the tapes produced on industrial machines with their wider head gap, better picture and more tracking tolerance."

All in all, dealers—whether they're currently in the prerecorded videotape business or not—are far from happy about it. Based on the tenor of the replies to this Retail Opinion File, it would seem that the supplier still has a way to go to improve his communications with the retail community, clarify the many misconceptions, satisfy valid complaints and do whatever else is necessary to brighten the picture for those who want to sell this newest of home entertainment products to the consumer.

Otherwise, as was the case with audio, the industry will split, and it will end up with those who produce and sell hardware, separate from those who deal in software. •

58th ANNUAL STATISTICAL & MARKETING REPORT

Merchandising
STORAGE
ON
OFF

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10-Year Tables: Major Appliance Analysis

The last year of the '70s wound up as one of the strongest in major appliances.

While the 39,872,000 units amassed in 1973 remains the high-water mark, the 36,465,000 units recorded last year was no small achievement and well above the 1975 recession low of 28,291,000.

Moreover, the 1979 numbers were achieved in a none-too-robust sales climate, what with all the talk of another recession.

It was also a year of mergers and acquisitions: The addition of Frigidaire to the White Consolidated family of Gibson, Kelvinator, Vesta and Westinghouse (while dropping Bendix and Hamilton). The acquisition of Admiral and Norge by Magic Chef. The addition to the Raytheon lineup of Amana, Caloric and Glenwood/Sunray through acquisition of Modern Maid and Speed Queen from McGraw-Edison. The acquisition of Jenn-Air by Carrier (which in turn was acquired by United Technologies Corp.) The takeover of Tappan by the Swedish conglomerate, Electrolux, (which is the parent of Emerson Quiet Kool and Eureka).

Largest dollar results

The numbers recorded in 1979 were big in any event. The total retail value of $13 billion is the largest ever. The cost of inflation and conformance to government regulations—notably in making appliances more energy efficient—were major factors in this dollar increase. But so too was the strong demand for larger and better-featured appliances.

Refrigeration

The biggest volume, in units—as well as dollar value—was again chalked up by refrigerators, with over 6 million units, including nearly 500,000 compacts.

The slight downturn in refrigerator sales, as shown in the charts, was largely due to the drop-off in builder sales, reflecting the tight-money induced slump in housing.

Freezers, on the other hand, showed sales gains in all configurations—chests, uprights and compacts—in a sales surge fueled by the inflationary costs of food and gas which led to fewer shopping trips.

Chests, which are particularly strong in rural areas, topped the million-unit mark for the first time since 1975.

Total sales exceeded 2 million units, with chests as 1,001,000; uprights, 858,000; and compacts, 549,000.

Air treatment

Higher costs, dictated by energy efficiency requirements, as well as less favorable weather conditions contributed to lower room air conditioner unit volume, 3,749,000. But this was surpassed in the last five years, only by the previous year's 4,037,000, and the retail value of over $1.3 billion was the highest ever.

Electronic air cleaners edged up to 247,000 units from 231,000.

But the big gainer in the air treatment category was the dehumidifier. Demand generated by the thaws from last winter's heavy snows in much of the Midwest where demhumidifer sales predominate, contributed to a record sales year of 684,000 units, a whopping 55% gain over 1978's 441,000.

The retail value of $61.7 million also set a new high.

Microwave ovens

New sales highs were registered in another category, microwave ovens.

Continuing its uninterrupted growth, this category posted new highs in total unit volume—2,422,000; countertops, 2,190,000; and combinations units, 232,000—as well as dollar volume.

The latter, at $1.1 billion, broke the billion-dollar barrier for the first time, with the growth in combination units and continuing popularity of high-end features like touch control and probes key factors.

Ranges

However, sales of ranges—the most "builder sensitive" of appliances—experienced declines. Gas units, bolstered by improved fuel availability and utility promotion, slipped a mere 3,000 units to 1,794,000. Electrics, hurt more by the home building decline, dropped to 3,003,000 from 3,218,000.

Cleanup appliances

Dishwasher volume slipped 1.9% to 3,488,000, with a 13.9% drop to 585,500 in portables overcoming a slight gain, to 2,994,000 in built-ins. A slight gain, to 3,316,000—a new high—was registered by disposers, but compactors slipped 2.2% to 293,000.

Home laundry

Although off a bit, it was another big 8.5 million unit year for home laundry. One segment showing a gain was gas dryers, the slight 1.5% improvement being of a similar magnitude as the dips in automatic washers, electric dryers and compacts.

With the new highs in microwave ovens, dehumidifiers and disposers, and growth in freezers, offsetting the small losses in most other products, 1979 provided a fine finish to a decade. ●

TEN YEAR TABLES:

Product Sales Growth & Performance

**MANUFACTURER SHIPMENTS OF PRODUCTS FOR SALE
IN THE UNITED STATES WHETHER U.S. OR FOREIGN MADE**

MAJOR APPLIANCES

	1970		1971		1972		1973		1974	
PRODUCTS	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)
AIR TREATMENT										
Air Cleaners, Electronic	–	–	–	–	–	–	–	–	250	81,250
Air Conditioners, Room	5,887	1,206,835	5,483	1,147,376	4,508	910,616	5,346	1,069,000	4,564	931,056
Dehumidifiers	598	47,242	397	32,513	461	38,263	646	55,556	486	52,740
Total Air Treatment	6,485	1,254,077	5,880	1,179,889	4,969	948,879	5,992	1,124,556	5,400	1,065,046
KITCHEN APPLIANCES										
Dishwashers, Total	2,116	465,904	2,477	541,536	3,199	676,332	3,702	800,040	3,320	758,700
Convertible	680	129,880	712	137,397	842	162,506	981	193,257	860	180,600
Undercounter & Other	1,436	336,024	1,765	404,139	2,357	513,826	2,721	606,783	2,460	578,100
Disposers, Food Waste	1,977	128,505	2,292	137,490	2,771	171,802	2,974	193,310	2,553	194,028
Freezers, Total (10 cu.ft. & over)	1,359	302,173	1,437	311,085	1,577	342,094	2,415	532,702	3,219	754,376
Chest	569	129,163	635	137,203	731	159,358	1,013	222,860	1,327	307,864
Upright	790	123,010	802	173,882	846	182,736	1,402	309,842	1,892	446,512
Microwave Ovens, Total	30	15,000	100	45,000	325	130,000	440	167,200	635	217,000
Counter-Top	–	–	–	–	–	–	–	–	610	198,250
Combination Units	–	–	–	–	–	–	–	–	25	18,750
Ranges, Electric, Total	2,362	540,177	2,714	600,825	3,232	706,934	3,430	934,974	2,925	701,839
Free-Standing†	1,767	417,012	2,014	469,169	2,422	549,794	2,624	778,610	2,279	567,471
Built-In†	595	123,165	700	131,656	810	157,140	806	156,364	646	134,368
Ranges, Gas, Total	2,362	509,532	2,549	516,780	2,661	564,568	2,481	544,221	1,950	447,017
Free-Standing	1,815	353,847	1,963	363,174	2,052	404,244	2,110	424,110	1,669	352,222
High-Oven	222	85,355	223	81,322	219	84,534	202	80,396	156	64,222
Built-In†	167	43,368	117	43,438	194	44,038	169	39,715	125	30,573
Set-In*	158	26,962	186	28,846	196	31,752	–	–	–	–
Ranges, Smooth-Top	–	–	–	–	–	–	210	81,000	300	142,200
Refrigerators (6.5 cu.ft. & over)	5,286	1,448,364	5,691	1,542,207	6,315	1,705,050	6,774	1,889,946	5,982	1,764,690
Trash Compactors	–	–	100	26,000	210	48,300	320	70,400	315	66,150
Total Kitchen Appliances	15,492	3,409,655	17,360	3,720,923	20,290	4,345,080	22,746	5,213,793	21,199	5,046,000
HOME LAUNDRY										
Dryers, Total (25" or more in width)	2,981	525,089	3,377	582,713	3,925	688,597	3,966	699,754	3,274	599,145
Electric	2,129	359,801	2,527	417,021	2,989	505,141	3,040	515,480	2,535	443,955
Gas	852	165,288	850	165,692	936	183,456	926	184,274	739	155,190
Washers, Total (25" or more in width)	4,094	957,316	4,609	1,077,259	5,107	1,212,122	5,029	1,258,051	4,558	1,199,171
Automatic & Semi-Auto**	3,869	924,691	4,270	1,024,776	4,824	1,167,408	4,759	1,215,391	4,323	1,159,926
Wringer & Spinner	225	32,625	339	52,483	283	44,714	270	42,660	235	39,245
Total Home Laundry	7,075	1,482,405	7,986	1,659,972	9,032	1,900,719	8,995	1,957,805	7,832	1,798,316
COMPACT APPLIANCES										
Refrigerators (Under 6.5 cu.ft.)	–	–	–	–	–	–	329	45,731	375	54,375
Freezers (Under 10 cu.ft.)	–	–	–	–	–	–	280	47,320	300	54,000
Washers (24" or less in width)	–	–	–	–	–	–	475	87,875	390	74,880
Dryers (24" or less in width)	–	–	–	–	–	–	290	60,610	310	70,990
Total Compact Appliances	–	–	–	–	–	–	1,374	241,536	1,375	254,245
GRAND TOTAL – MAJOR APPLIANCES	29,052	6,146,137	31,181	6,560,784	34,291	7,194,678	39,107	8,477,890	35,806	8,163,607

*Set-Ins Included in Free-Standing 1973-1979
**Includes Combinations
† Includes Microwave Oven Combinations ***Revised

1975		1976		1977		1978		1979		
NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	PRODUCTS
										AIR TREATMENT
230	76,800	190	67,900	220	78,770	231	85,467	247	87,370	Air Cleaners, Electronic
2,670	640,800	2,962	740,500	3,270	912,330	4,037	1,312,025	3,749	1,327,146	Air Conditioners, Room
392	37,240	440	52,360	314	46,786	441	61,740	684	97,812	Dehumidifiers
3,292	**774,840**	**3,592**	**860,760**	**3,804**	**1,037,886**	**4,709**	**1,459,232**	**4,680**	**1,512,328**	**Total Air Treatment**
										KITCHEN APPLIANCES
2,702	697,155	3,140	855,110	3,356	993,780	3,557	1,081,750	3,488	1,138,216	**Dishwashers, Total**
755	181,200	803	200,750	651	181,280	586	190,450	504	174,384	Convertible
1,947	515,955	2,337	654,360	2,705	811,500	2,971	891,300	2,984	963,832	Undercounter & Other
2,080	187,200	2,516	251,600	2,941	323,510	3,313	284,918	3,316	295,124	**Disposers, Food Waste**
2,457	599,974	1,542	420,678	1,598	489,962	1,522	499,300	1,859	699,270	**Freezers, Total (10 cu.ft. & over)**
1,381	334,202	832	215,488	852	238,560	835	258,850	1,001	360,360	Chest
1,076	265,772	710	205,190	746	251,402	687	240,450	858	338,910	Upright
840	336,800	1,661	696,017	2,175	982,325	2,422	1,142,300	2,815	1,310,950	**Microwave Ovens, Total**
790	296,250	1,561	619,717	2,000	820,000	2,190	919,800	2,535	1,039,350	Counter-Top
50	40,550	100	76,300	175	162,325	232	222,500	280	271,600	Combination Units
2,082	512,946	2,463	664,745	3,009	919,071	3,218	1,132,050	3,003	1,151,502	**Ranges, Electric, Total**
1,568	401,408	1,762	491,598	2,193	699,567	2,337	841,320	2,244	870,672	Free-Standing†
514	111,538	701	173,147	816	219,504	881	290,730	759	280,830	Built-In†
1,618	382,767	1,823	488,767	1,753	536,605	1,797	618,618	1,794	643,498	**Ranges, Gas, Total**
1,381	302,439	1,569	390,681	1,494	431,766	1,546	511,395	1,538	524,458	Free-Standing†
112	48,203	123	58,917	126	61,614	123	62,976	128	71,552	High-Oven
125	32,125	131	39,169	133	43,225	129	44,247	128	47,488	Built-In†
–	–	–	–	–	–	–	–	–	–	Set-In*
275	144,375	267	140,175	274	147,412	249	137,697	220	139,040	**Ranges, Smooth-Top**
4,577	1,423,447	4,817	1,685,950	5,707	2,425,475	5,890	3,227,720	5,701	3,186,859	**Refrigerators (6.5 cu.ft. & over)**
233	52,425	249	57,021	277	66,480	300	72,300	293	73,543	**Trash Compactors**
16,864	**4,337,089**	**18,478**	**5,260,063**	**21,090**	**6,884,620**	**22,268**	**8,196,653**	**22,489**	**8,638,002**	**Total Kitchen Appliances**
										HOME LAUNDRY
2,680	672,130	2,982	785,538	3,339	929,599	3,392	863,611	3,333	905,517	**Dryers, Total (25" or more in width)**
2,008	494,050	2,274	588,006	2,603	716,895	2,635	651,651	2,565	679,725	Electric
672	178,080	708	197,532	736	212,704	757	211,960	768	225,792	Gas
3,978	1,292,680	4,237	1,509,953	4,648	1,731,206	4,728	1,711,290	4,666	1,706,364	**Washers, Total (25" or more in width)**
3,782	1,257,400	4,033	1,471,193	4,454	1,690,660	4,528	1,670,690	4,480	1,666,560	Automatic & Semi-Auto**
196	35,280	204	38,760	194	40,546	200	40,600	186	39,804	Wringer & Spinner
6,658	**1,964,810**	**7,219**	**2,295,491**	**7,987**	**2,660,805**	**8,120**	**2,574,901**	**7,999**	**2,611,881**	**Total Home Laundry**
										COMPACT APPLIANCES
318	50,880	347	56,561	333	54,945	549***	96,075***	498	86,154	**Refrigerators (Under 6.5 cu.ft.)**
279	53,010	243	46,899	245	47,775	262	52,400	282	70,500	**Freezers (Under 10 cu.ft.)**
250	53,000	255	55,335	285	62,770	310	70,990	299	75,647	**Washers (24" or less in width)**
190	44,460	192	50,688	214	57,780	229	64,349	218	63,220	**Dryers (24" or less in width)**
1,037	**201,350**	**1,037**	**209,483**	**1,077**	**223,270**	**1,350*****	**283,814*****	**1,297**	**295,521**	**Total Compact Appliances**
27,851	**7,822,959**	**30,326**	**8,625,797**	**33,958**	**10,806,581**	**36,447 *****	**12,514,600*****	**36,465**	**13,057,732**	**GRAND TOTAL – MAJOR APPLIANCES**

Sources: AHAM & GAMA. All appliances except Air Cleaners, Microwave Ovens, Smooth-Top Ranges, and Compacts include exports.

*Set-Ins Included in Free-Standing 1973-1979

**Includes Combinations

†Includes Microwave Oven Combinations

***Revised

MAJOR APPLIANCE HIGHLIGHTS

TOTAL MAJOR APPLIANCE VOLUME, IN UNITS

Product	1979 Units (000)	1979 % Of Total	1978 Units (000)	1978 % Of Total
AIR CLEANERS, ELECTRONIC	247	0.7	231	0.6
AIR CONDITIONERS, ROOM	3,749	10.3	4,037	11.0
DEHUMIDIFIERS	684	1.9	441	1.2
DISHWASHERS	3,488	9.6	3,557	9.7
DISPOSERS, FOOD WASTE	3,316	9.2	3,313	9.0
DRYERS (including compacts)	3,551	9.8	3,850	10.5
FREEZERS (including compacts)	2,141	5.9	1,784	4.9
MICROWAVE OVENS	2,815	7.8	2,422	6.6
RANGES, ELECTRIC (including Smoothtops)	3,003	8.3	3,218	8.7
RANGES, GAS	1,794	4.9	1,797	4.9
REFRIGERATORS (including compacts)	6,199	17.1	6,439	17.5
TRASH COMPACTORS	293	0.8	300	0.8
WASHERS (including compacts)	4,965	13.7	5,348	14.6
TOTAL	36,245	100.0%	36,737	100.0%

Analysis:

It may have been a virtual standoff in terms of overall unit volume, but a general upgrading in the product mix—and selling price—made 1979 a "plus" year for the major appliance industry.

Cutting across virtually every product category with varying degrees of impact was the energy issue. Adding to manufacturing, distribution and product costs in most cases, it also provided a new feature/benefit benefit to the market.

Microwave ovens

In cooking appliances, the time- and energy-saving appeal unquestionably contributed to the continuing record-setting sales growth of microwave ovens of all types. For example, more combination units were sold than ever before. With their $700-$1,000 selling prices, these units made a significant contribution to dollar volume.

Of 280,000 such models sold in 1979, compared with 232,000 the year before, 47,000 were single-cavity units, up from 45,000. The remainder were double ovens, of which 206,000 were with electric conventional oven (up from 166,000 in 1978) and 27,000 were with gas (up from 21,000).

Countertops, meanwhile, continued their substantial growth to 2,535,000 (up from 2,190,000). Such upgraded features as touch control, meat probes and recipe card programmables helped keep average selling prices high in the face of stiffening competition between domestic and offshore producers.

Other cooking appliances

In ranges, the convection cooking concept was being expanded in both gas and electric versions; induction cooking and modular cooktops made their appearance in electrics; and more energy-saving pilotless ignition units turned up in gas range lines.

All these helped stimulate a replacement market which at least partially overcame the negative effects of the home building slump, while raising the average ticket sale.

The sales share of self-cleaning oven models, another revenue producing feature, rose another notch to 39% in electric ranges and similarly to 12% in gas ranges.

Continuous-cleaning units lost a bit of ground, dropping to 22% of the electric range business (from 25%) and remaining at 36% in gas ranges.

Another segment losing ground, possibly due to consumer perceptions of poorer energy efficiency, was the smoothtop, where volume dropped 12% to 220,000 from 249,000.

Gas ranges retained their 4.9% share of the overall appliance market with virtually the same unit sales as a year ago, while electrics slipped to 8.3% from 8.7% on a unit sales decline. The microwave oven share of the appliance pie expanded to 7.8% from 6.6%.

Home laundry

Home laundry lost a bit of its market share: Washers dropped to 13.7% from 14.6% (although gas versions posted a 1.5% unit sales gain in slightly improving their position relative to electrics).

Energy usage improvements were less visible in laundry equipment than in most other products—aside from the elimination of pilot lights on gas dryers—and, in the main, were dependent on the user's selection of more cold water wash and rinse cycles.

Cleanup appliances

Dishwashers, too, lost a little appliance market share—to 9.6% from 9.7%—mainly because portable sales fell 82,000 units (built-ins gained 13,000 units). Like laundry, their energy-conservation story focused largely on users choosing no-heat drying cycles and maximizing loads.

Product developments included KitchenAid's built-in heater models which permit lower water heater settings and the "steam machine" from Thermador-Waste King. Also, better insulation (to retain heat and save energy) and loading flexibility were general industry trends.

Product improvement, primarily better sound absorbency, helped disposers gain sales and market share. Improved mechanisms, as well as bagging and air freshening features, were factors in trash compactors retaining their share.

Refrigeration products

Upgrading of product was evident in refrigerators. Higher price tags due to bigger capacities and more deluxe features, like ice and water dispensers, glass shelves and textured finishes, helped compensate for a 3% drop in unit sales. Despite the effects of the drop in builder sales, refrigerators retained the largest slice of the appliance pie with 17.1% (down from 17.5%).

No-frost models accounted for 80% of refrigerator sales, as they did a year earlier. The big change was the growing demand for larger capacity units and top-mounts.

Top-mounts increased their share to 74%, from 72%, while side-by-sides and bottom-mounts each dropped a point to 16% and 2%, respectively, and single doors held at 8%.

Freezers, given a boost by continuing inflated food prices, gained a percentage point, to 5.9% of the total appliance market. Also, there was a trend toward larger sizes, like in refrigerators.

Air treatment

Dehumidifiers, another product showing a 1979 sales gain, also improved their share a point to 1.9%.

Room air conditioners declined in sales, but saw high efficiency—7.5 EER and over—models increase their market share to 35% from 30%.

By size grouping, 7,000-10,999 Btus gained a point to 31%, while the 11,000-19,999 Btus slipped a point to 28%.

MAJOR APPLIANCE HIGHLIGHTS (continued)

FREEZER SHIPMENTS BY SIZE OF UNIT

Size in Cubic Feet	1979 Units (000)	% Of Total	1978 Units (000)	% Of Total	% Change 1979/1978
10 – 14	335	18	457	30	-27
15	390	21	274	18	+42
16 & 17	409	22	259	17	+58
18 & 19	204	11	152	10	+34
20 & OVER	521	28	380	25	+37
TOTAL	1,859		1,522		+22

FREEZER SHIPMENTS BY DEFROSTING SYSTEM

Type	1979 Units (000)	% Of Total	1978 Units (000)	% Of Total	% Change 1979/1978
NO-FROST	193	9	161	9	+20
ALL OTHER	1,948	91	1,623	91	+20
TOTAL	2,141		1,784		+20

REFRIGERATOR SHIPMENTS BY DEFROSTING SYSTEM

Type	1979 Units (000)	% Of Total	1978 Units (000)	% Of Total	% Change 1979/1978
NO-FROST	4,959	80	5,112	80	-3
ALL OTHER	1,240	20	1,278	20	-3
TOTAL	6,199		6,390		-3

REFRIGERATOR SHIPMENTS BY FREEZING COMPARTMENT*

Type	1979 Units (000)	% Of Total	1978 Units (000)	% Of Total	% Change 1979/1978
TOP-MOUNT	4,219	74	4,241	72	- 1
BOTTOM-MOUNT	114	2	177	3	-36
SIDE-BY-SIDE	912	16	1,001	17	- 9
SINGLE DOOR	456	8	471	8	- 3
TOTAL	5,701		5,890		- 3

*For Refrigerators 6.5 cu.ft. and over

REFRIGERATOR SHIPMENTS BY SIZE OF UNIT

Size in Cubic Feet	1979 Units (000)	% Of Total	1978 Units (000)	% Of Total	% Change 1979/1978
6.5 TO 11	342	6	471	8	-27
12 & 13	513	9	589	10	-13
14 & 15	1,254	22	1,237	21	+ 1
16 & 17	1,254	22	1,237	21	+ 1
18 & 19	1,084	19	1,119	19	- 3
20 & 21	684	12	648	11	+ 6
22 & OVER	570	10	589	10	- 3
TOTAL	5,701		5,890		- 3

ELECTRONIC AIR CLEANERS BY TYPE

Type	1979 Units (000)	1979 Retail Dollars (000)	1978 Units (000)	1978 Retail Dollars (000)
PORTABLE ROOM	56	12,880	53	8,215
CENTRAL & DUCT-MOUNTED	191	74,490	178	77,252
TOTAL	247	87,370	231	85,467

MICROWAVE OVEN/RANGE COMBINATIONS BY TYPE OF UNIT

Type	1979 Units (000)	1979 Retail Dollars (000)	1978 Units (000)	1978 Retail Dollars (000)
SINGLE CAVITY	47	39,950	45	33,975
DOUBLE OVEN, GAS	27	25,650	21	18,375
DOUBLE OVEN, ELECTRC	206	206,000	166	170,150
TOTAL	280	271,600	232	222,500

SMOOTH-TOP RANGES BY TYPE OF UNIT

Type	1979 Units (000)	% Of Total	1978 Units (000)	% Of Total	% Change 1979/1978
FREE-STANDING	151	69	169	68	-11
BUILT-IN	69	31	80	32	-14
TOTAL	220		249		-12

GAS RANGE SHIPMENTS BY CLEANING SYSTEM

Type	1979 Units (000)	% Of Total	1978 Units (000)	% Of Total	% Change 1979/1978
SELF-CLEANING	215	12	198	11	+9
CONTINUOUS-CLEAN	646	36	647	36	—
ALL OTHER	933	52	952	53	-2
TOTAL	1,794		1,797		—

ELECTRIC RANGE SHIPMENTS BY CLEANING SYSTEM

Type	1979 Units (000)	% Of Total	1978 Units (000)	% Of Total	% Change 1979/1978
SELF-CLEANING	1,171	39	1,223	38	– 4
CONTINUOUS-CLEAN	661	22	805	25	-18
ALL OTHER	1,171	39	1,190	37	- 2
TOTAL	3,003		3,218		- 7

ROOM AIR CONDITIONER SHIPMENTS BY EER RATING

Type	1979 Units (000)	% Of Total	1978 Units (000)	% Of Total	% Change 1979/1978
HIGH (7.5 & OVER)	1,312	35	1,211	30	+ 8
LOW (Under 7.5)	2,437	65	2,826	70	-14
TOTAL	3,749		4,037		- 7

ROOM AIR CONDITIONER SHIPMENTS BY SIZE OF UNIT

Size in (B.t.u.)	1979 Units (000)	% Of Total	1978 Units (000)	% Of Total	% Change 1979/1978
Under 7,000	1,162	31	1,251	31	- 7
7,000–10,999	1,162	31	1,211	30	- 4
11,000–19,999	1,050	28	1,171	29	-10
20,000 & Over	375	10	404	10	- 7
TOTAL	3,749		4,037		- 7

10-Year Tables: Housewares Analysis

Seven of the eight major housewares categories tracked by *Merchandising* show increases in both units shipped and retail value for 1979 as compared to 1978.

Only half of these—kitchen electrics, personal care, air treatment and floor care—include products with a 10-year record.

A new addition to coffeemakers in 1972—the automatic drip models—now accounts for more than all coffeemakers shipped in 1970. . . . 8.3 million ADC units shipped in 1979 versus 8.1 million total coffeemakers in 1970.

Total coffeemaker shipments last year amounted to 12.1 million with a retail value of $298.3 million.

Irons more stable

In the same period, irons have been a more stable appliance, totaling just about one million more units shipped in 1979 than a decade ago.

Reflecting technological improvements such as self-cleaning and lightweight models, as well as inflation, the average price of an iron has risen about $11 over the past 10 years—from roughly $17 to $28.

The above points out a very important positive for housewares of all kinds—while other daily staples such as food, clothing and transportation have doubled, tripled and even quadrupled in price with little or no noticeable improvements since 1970, housewares have risen at a much lower pace, while the product—in most instances—has become more efficient.

Coffeemakers took first place away from irons in 1974 and toasters ceded third place to slow cookers from 1975 to 1977. However, toasters regained third place in 1978 and have strengthened their hold on this position—nearing the nine-million unit mark last year.

Thus the big three in kitchen electrics, irons, coffeemakers and toasters in 1970 became coffeemakers, irons and toasters in 1979—a slight shift in position but definitely at the head of the class which has grown from 13 to 23 items.

Personal care more volatile

The 10-year picture in personal care is defintely more volatile. The number of products tracked has doubled from seven to 14. Unit shipments of hair dryers—as well as kinds available—have more than tripled in the decade, from 6.1 million in 1970 to 18.4 million in 1979.

The average price has dropped. Ten years ago it was $24, last year it was $17. This is almost like going against gravity considering the greater efficiency and ease the higher wattage, more compact and cosmetically-improved units available today offer. The lower price reflects the highly competitive nature of the industry.

While hair dryers have the lowest retail price compared to 10 years ago, they do not stand alone in this category. Make-up mirrors averaged $22 a piece then, now the figure is less than $21; the average price of electric toothbrushes has dropped from $15 to $11; while hairsetters have held at $22 per unit. Water pulsators have risen in price from $18 to $20; heating pads from $6 to $9 and bed coverings (electric blankets) from $20 to $28. Being well-groomed—if you do it yourself—may be the least expensive item in today's budget.

Vac shipments stable

Vacuum cleaners have been relatively stable over the past decade. Total units shipped in 1970 were 7.4 million; in 1979 the total was 8.9 million. The growth was gradually upward to a 9.1 million peak in 1973, wavering between 1974 and the present.

Since 1971, it has been downward all the way for floor polishers. Unit shipments for last year totalled less than one-half the 1970 figure.

While unit sales of floor care—subtracting carpet sweepers which were not included 10 years ago—have gone up approximately 1.3 million, retail value has more than doubled. The average price of vacs has almost doubled and for floor polishers, gone up about one-third.

Energy helps fans and heaters

Total fan unit shipments plateaued at the 9.4 to 10.5 million level until 1978 when the energy crunch helped boost them to 11.6 million. Last year another healthy gain was posted, bringing fans to a unit total of almost 12.5 million with a retail value of $485.8 million.

Portable heaters have been another beneficiary of the Middle East oil price increases and reduced production. In 1970, units shipped were recorded at 2.8 million with a retail value of just about $70 million. Comparable figures for 1979 are 4.5 million units and $138 million—close to double on both counts.

In the 1970s, housewares products that had been around for at least a decade were very much alive and well. For highlights on newer additions, see following pages. ●

TEN YEAR TABLES:

Product Sales Growth & Performance

MANUFACTURER SHIPMENTS OF PRODUCTS FOR SALE IN THE UNITED STATES WHETHER U.S. OR FOREIGN MADE

HOUSEWARES

PRODUCTS	1970		1971		1972		1973		1974	
	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)
PERSONAL CARE										
Bed Covering	4,050	81,000	4,000	72,000	4,100	77,900	4,300	86,000	4,410	97,020
Curling Irons/Styling Wands	–	–	–	–	–	–	2,000	32,000	4,000	60,000
Hair Dryers, Total	6,100	146,400	7,773	171,006	9,076	181,520	10,800	237,600	11,965	263,230
Portable With Bonnet	–	–	–	–	–	–	–	–	500	–
Hard-Top	–	–	–	–	–	–	–	–	900	–
Styling Dryers	–	–	–	–	–	–	–	–	5,153	–
Pistol Type	–	–	–	–	–	–	–	–	5,412	–
Hair Setters	5,500	121,000	3,800	79,800	3,400	74,800	3,250	65,000	2,965	65,230
Heating Pads	3,900	23,400	3,900	27,300	4,200	33,600	4,375	35,000	4,225	42,250
Hot Lather Dispensers	–	–	–	–	–	–	2,500	50,000	2,825	50,850
Massagers, Hand Held	–	–	–	–	–	–	900	13,500	810	12,960
Massagers, Shower (Heads)	–	–	–	–	–	–	–	–	–	–
Mirrors, Make-Up	2,700	59,400	1,975	31,600	1,750	29,750	1,625	26,000	1,440	25,920
Oral Hygiene Devices, Total	2,850	45,900	2,250	35,550	2,280	31,800	2,200	27,500	1,935	28,040
Water Pulsators	1,050	18,900	900	15,300	1,080	16,200	1,100	14,300	950	14,250
Toothbrushes, Electric	1,800	27,000	1,350	20,250	1,200	15,600	1,100	13,200	985	13,790
Saunas, Facial	–	–	–	–	–	–	1,000	16,000	845	15,210
Shavers, Total	–	–	–	–	–	–	–	–	5,075	116,350
Men's	–	–	–	–	–	–	–	–	3,850	94,650
Women's	–	–	–	–	–	–	–	–	1,225	21,700
Total Personal Care	**25,100**	**477,100**	**23,698**	**417,256**	**24,806**	**429,370**	**32,950**	**588,600**	**40,495**	**777,060**
CLOCKS										
Clocks, Total	–	–	–	–	–	–	–	–	21,107	161,591
Decorative Wall, Total	–	–	–	–	–	–	–	–	3,876	64,934
Analog	–	–	–	–	–	–	–	–	3,700	55,500
Digital	–	–	–	–	–	–	–	–	176	9,434
Kitchen Wall, Total	–	–	–	–	–	–	–	–	5,102	30,763
Analog	–	–	–	–	–	–	–	–	5,000	29,200
Digital	–	–	–	–	–	–	–	–	102	1,563
Alarm, Total	–	–	–	–	–	–	–	–	11,514	57,658
Analog	–	–	–	–	–	–	–	–	9,800	42,500
Digital	–	–	–	–	–	–	–	–	1,714	15,158
Desk/Table/Occasional, Total	–	–	–	–	–	–	–	–	615	8,236
Analog	–	–	–	–	–	–	–	–	607	7,891
Digital	–	–	–	–	–	–	–	–	8	345
COOKWARE & BAKEWARE										
Cookware & Bakeware, Total	–	–	–	–	–	–	70,373	–	73,433	–
Stainless Steel	–	–	–	–	–	–	15,000	–	17,000	–
Enamel	–	–	–	–	–	–	7,580	–	8,000	–
Aluminum	–	–	–	–	–	–	41,080	–	41,600	–
Cast Iron	–	–	–	–	–	–	4,333	–	4,233	–
Porcelain Enamel on Cast Iron	–	–	–	–	–	–	2,380	–	2,600	–
HOME SECURITY										
Home Security, Total	–	–	–	–	–	–	–	–	–	–
Smoke Detectors	–	–	–	–	–	–	–	–	–	–
Fire Extinguishers	–	–	–	–	–	–	–	–	–	–
Intrusion Systems	–	–	–	–	–	–	–	–	–	–
Smoke/Fire/Intrusion Systems	–	–	–	–	–	–	–	–	–	–
OUTDOOR PRODUCTS										
Barbecue Grills, Total	–	–	–	–	–	–	–	–	–	–
Gas	–	–	–	–	–	–	–	–	–	–
Electric	–	–	–	–	–	–	–	–	–	–
Charcoal	–	–	–	–	–	–	–	–	–	–
Power Mowers, Total	–	–	–	–	–	–	–	–	–	–
Powered Walk-Behind	–	–	–	–	–	–	–	–	–	–
Riding	–	–	–	–	–	–	–	–	–	–
Garden Tractors	–	–	–	–	–	–	–	–	–	–
Snow Throwers, Walk-Behind, Total	–	–	–	–	–	–	–	–	–	–
Single Stage	–	–	–	–	–	–	–	–	–	–
2-Stage	–	–	–	–	–	–	–	–	–	–

* Revised

† Factory Dollars

1975		1976		1977		1978		1979		
NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	PRODUCTS
										PERSONAL CARE
4,032	88,704	4,370	100,510	4,490	112,250	4,900	127,400	5,125	143,500	**Bed Covering**
3,200	36,960	7,000	94,000	6,000	78,000	6,200	75,500	6,463	58,868	**Curling Irons/Styling Wands**
10,496	242,338	12,555	277,960	16,495	388,755	18,970	353,935	18,488	312,670	**Hair Dryers, Total**
343	6,860	325	7,150	445	9,345	450	9,000	482	10,122	Portable With Bonnet
550	14,850	430	11,610	510	13,770	495	13,860	539	16,979	Hard-Top
4,922	108,284	6,000	120,000	6,400	128,000	6,625	125,875	5,200	96,044	Styling Dryers
4,681	112,344	5,800	139,200	9,140	237,640	11,400	205,200	12,267	189,525	Pistol Type
2,033	36,592	2,000	36,647	1,800	36,100	1,989	41,255	2,382	51,800	**Hair Setters**
3,500	31,500	3,780	34,020	3,800	30,400	3,940	35,460	4,100	36,900	**Heating Pads**
2,678	40,170	2,185	28,405	1,600	19,200	1,590	17,490	1,225	12,250	**Hot Lather Dispensers**
700	11,900	750	12,325	780	12,480	798	12,768	830	13,280	**Massagers, Hand Held**
1,284	33,384	1,961	54,908	1,700	42,500	2,035	40,700	1,885	37,229	**Massagers, Shower (Heads)**
1,210	25,410	1,263	30,312	1,400	33,600	1,490	32,780	1,633	34,293	**Mirrors, Make-Up**
1,602	23,196	1,499	20,986	1,365	18,900	1,540	25,480	1,650	27,721	**Oral Hygiene Devices, Total**
812	10,556	824	11,536	840	12,600	1,000	19,000	1,126	21,957	Water Pulsators
790	12,640	675	9,450	525	6,300	540	6,480	524	5,764	Toothbrushes, Electric
670	10,050	590	8,850	450	7,200	440	7,040	550	9,763	**Saunas, Facial**
5,090	127,135	4,700	129,200	5,200	149,500	5,650	162,800	5,960	177,405	**Shavers, Total**
3,725	108,025	3,600	111,600	3,900	128,700	4,450	142,400	4,675	154,275	Men's
1,365	19,110	1,100	17,600	1,300	20,800	1,200	20,400	1,285	23,130	Women's
36,495	**707,339**	**42,653**	**828,123**	**45,080**	**928,885**	**49,542**	**932,608**	**50,291**	**915,679**	**Total Personal Care**
										CLOCKS
21,290	231,820	18,832	230,077	22,763	282,674	23,987	332,060	26,664	417,494	**Clocks, Total**
3,903	86,282	3,529	92,809	4,150	110,617	4,477	152,764	5,066	194,828	Decorative Wall, Total
3,700	74,000	3,275	75,325	3,900	93,600	4,164	137,412	4,610	178,868	Analog
203	12,282	254	17,484	250	17,017	313	15,352	456	15,960	Digital
5,017	55,935	4,495	50,726	5,510	61,050	6,061	66,048	6,284	82,322	Kitchen Wall, Total
4,900	53,900	4,348	47,828	5,400	59,400	5,879	63,493	6,158	80,054	Analog
117	2,035	147	2,898	110	1,650	182	2,555	126	2,268	Digital
11,771	78,534	10,189	74,371	12,423	97,157	12,756	97,379	14,417	119,146	Alarm, Total
9,800	58,800	7,713	46,278	9,500	57,000	9,700	72,750	9,804	71,863	Analog
1,971	19,734	2,476	28,093	2,923	40,157	3,056	24,629	4,613	47,283	Digital
599	11,069	619	12,171	680	13,850	693	15,869	897	21,198	Desk/Table/Occasional, Total
590	10,620	607	11,533	670	13,400	680	15,300	870	20,010	Analog
9	449	12	638	10	450	13	569	27	1,188	Digital
										COOKWARE & BAKEWARE
73,926	–	81,782	1,130,000	85,499	1,200,000	91,534	1,250,000	106,723	1,354,000	**Cookware & Bakeware, Total**
17,680	–	21,898	–	22,539	–	24,313	–	26,225	–	Stainless Steel
7,200	–	7,079	–	7,202	–	7,100	–	7,546	–	Enamel
42,400	–	45,918	–	48,806	–	53,319	–	65,552	–	Aluminum
4,157	–	4,281	–	4,322	–	4,302	–	4,850	–	Cast Iron
2,489	–	2,606	–	2,630	–	2,500	–	2,550	–	Porcelain Enamel on Cast Iron
										HOME SECURITY
5,736	–	8,734	–	12,490*	–	13,500	278,250	12,308	209,230	**Home Security, Total**
1,669	–	4,000	–	7,000*	–	8,500	153,000	6,600	94,200	Smoke Detectors
3,700	–	4,312	–	5,000	–	4,500	31,500	5,000	35,000	Fire Extinguishers
192	–	204	–	250	–	250	18,750	475	42,750	Intrusion Systems
175	–	218	–	240	–	250	75,000	233	37,280	Smoke/Fire/Intrusion Systems
										OUTDOOR PRODUCTS
7,240	–	9,144	171,035†	10,518*	204,179†	11,070*	219,650†	11,336	255,626†	**Barbecue Grills, Total**
650	–	860	94,713†	1,050*	116,797†	1,176*	112,945†	1,327	139,335†	Gas
90	–	125	4,672†	140*	5,413†	144*	4,839†	141	5,287†	Electric
6,500	–	8,159	71,650†	9,328*	81,969†	9,750*	101,866†	9,868	111,004†	Charcoal
5,670	–	6,000	1,016,700	6,085	1,062,700	6,315	1,261,250	6,814	2,260,480	**Power Mowers, Total**
4,800	–	5,100	469,900	5,200	488,300	5,350	535,000	5,760	1,094,400	Powered Walk-Behind
640	–	690	300,500	670	313,400	735	404,250	812	682,080	Riding
230	–	210	246,300	215	261,000	230	322,000	242	484,000	Garden Tractors
156	–	165	–	268	–	420	162,000	1,082	390,870	**Snow Throwers, Walk-Behind Total**
72	–	87	–	163	–	270	74,250	784	219,520	Single Stage
84	–	78	–	105	–	150	87,750	298	171,350	2-Stage

* Revised
† Factory Dollars

TEN YEAR TABLES:

Product Sales Growth & Performance

**MANUFACTURER SHIPMENTS OF PRODUCTS FOR SALE
IN THE UNITED STATES WHETHER U.S. OR FOREIGN MADE**

HOUSEWARES (continued)

PRODUCTS	1970		1971		1972		1973		1974	
	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)
KITCHEN ELECTRICS										
Bag Sealers	–	–	–	–	–	–	–	–	–	–
Blenders	5,100	127,500	4,100	86,100	4,400	101,200	4,700	98,700	4,300	90,300
Broilers, Total	2,605	70,650	2,650	73,350	2,724	78,240	2,650	75,600	2,475	75,150
With Rotisseries	880	39,600	950	42,750	990	43,560	950	39,900	900	40,500
Without Rotisseries	1,725	31,050	1,700	30,600	1,734	36,680	1,700	35,700	1,575	34,650
Can Openers, Total	5,000	65,000	4,750	61,750	4,975	64,675	5,250	73,500	5,435	86,960
Single Units	–	–	–	–	–	–	–	–	–	–
Combination Units	–	–	–	–	–	–	–	–	–	–
Coffeemakers, Total	8,100	129,600	8,700	139,200	9,000	171,000	9,325	195,825	10,422	243,564
Automatic (1-16 cup)	–	–	–	–	–	–	6,528	–	6,216	–
Party Perc (Over 16 cup)	–	–	–	–	–	–	1,678	–	1,491	–
ADC	–	–	–	–	–	–	1,119	–	2,715	–
Cornpoppers, Total	2,300	23,000	2,900	31,900	4,000	52,000	4,400	61,600	3,000	45,000
Buttering	–	–	–	–	–	–	–	–	–	–
Non-Buttering	–	–	–	–	–	–	–	–	–	–
Crepe Pans	–	–	–	–	–	–	–	–	–	–
Egg Cookers	–	–	–	–	–	–	–	–	487	5,844
Fondues, Electric	–	–	750	21,750	640	17,920	655	18,340	590	11,800
Food Processors	–	–	–	–	–	–	–	–	–	–
Food Slicers	–	–	–	–	–	–	–	–	–	–
Frypan–Skillets	3,200	92,800	3,300	99,000	3,500	112,000	3,625	112,375	3,547	117,051
Griddles/Quick Grills	500	12,500	550	14,850	620	17,360	645	16,770	725	21,750
Hotplates & Buffet Ranges	810	9,720	825	9,900	890	13,350	950	16,150	1,000	18,000
Ice Cream Makers	–	–	–	–	–	–	–	–	–	–
Ice Crushers	–	–	–	–	–	–	–	–	200	3,000
Irons, Total	9,275	159,210	9,350	161,000	9,510	179,410	9,745	201,090	9,700	220,450
Steam & Steam/Spray	7,985	143,730	8,150	146,700	8,400	168,000	8,700	191,400	8,750	210,000
Automatic Dry	915	10,980	870	10,440	800	8,000	760	6,840	710	7,810
Travel	375	4,500	330	3,960	310	3,410	285	2,850	240	2,640
Knives, Electric Slicing	2,075	41,500	2,175	45,675	2,250	49,550	2,300	46,000	2,075	43,575
Mixers, Food, Total	4,675	90,250	4,875	92,675	5,070	107,120	5,235	108,720	4,970	113,650
Stand Type	875	33,250	850	32,300	910	36,400	960	40,320	1,080	47,520
Portable Hand	3,800	57,000	4,025	60,375	4,160	70,720	4,275	68,400	3,890	66,130
Slow Cookers	–	–	–	–	–	–	3,200	80,000	5,700	119,700
Toasters, Total	5,975	107,550	6,300	116,550	6,650	113,050	6,845	116,365	7,177	143,540
Two-Slice	–	–	–	–	4,322	–	3,696	–	3,835	–
Four-Slice	–	–	–	–	1,530	–	1,780	–	1,860	–
Toaster-Ovens	–	–	–	–	798	–	1,369	–	1,482	–
Waffle Irons/Sandwich Grills	1,025	19,475	1,015	17,255	1,000	16,000	1,025	14,350	960	15,360
Woks, Electric	–	–	–	–	–	–	–	–	–	–
Total Kitchen Electrics	**50,640**	**948,755**	**52,240**	**971,055**	**55,229**	**1,092,875**	**60,550**	**1,235,386**	**62,763**	**1,374,694**
AIR TREATMENT										
Fans, Total	9,875	283,450	9,450	244,700	9,850	243,675	10,242	252,041	10,187	263,241
Desk & Bracket	1,325	29,150	1,200	21,600	1,100	16,500	1,125	14,625	1,175	17,625
Hassock or Floor	300	7,200	350	7,000	400	7,600	432	7,776	410	8,610
Exhaust, Built-In	1,900	36,100	2,300	48,300	2,450	49,000	2,610	57,420	2,540	58,420
Range Hoods	1,650	66,000	1,850	70,300	1,975	73,075	2,055	73,980	1,942	73,796
Window	3,900	117,000	3,000	75,000	3,100	74,400	3,140	75,360	3,225	80,625
Roll-About	800	28,000	750	22,500	825	23,100	880	22,880	895	24,165
Portable Electric Heaters, Total	2,835	69,935	2,750	66,000	2,925	70,200	3,170	72,910	3,625	94,250
Fan-Forced	2,600	65,000	–	–	–	–	–	–	–	–
Non-Fan-Forced	235	4,935	–	–	–	–	–	–	–	–
Baseboard	–	–	–	–	–	–	–	–	–	–
Humidifiers	1,000	72,000	1,100	79,200	1,150	83,950	1,225	91,875	1,100	85,470
Vaporizers	–	–	–	–	–	–	–	–	–	–
Total Air Treatment	**13,710**	**425,385**	**13,300**	**389,900**	**13,925**	**401,825**	**14,637**	**416,826**	**14,912**	**442,961**
FLOOR CARE										
Carpet Sweepers	–	–	–	–	–	–	–	–	1,000	15,000
Floor Polishers	1,156	46,240	1,158	46,336	994	39,760	767	34,515	640	30,720
Vacuum Cleaners, Total	7,382	501,976	7,973	518,264	8,337	541,905	9,124	650,160	8,251	643,578*
Canisters	–	–	–	–	–	–	–	–	3,602	–
Upright	–	–	–	–	–	–	–	–	3,436	–
Lightweight	–	–	–	–	–	–	–	–	1,213	–
Total Floor Care	**8,538**	**548,216**	**9,131**	**564,600**	**9,331**	**581,665**	**9,891**	**684,675**	**9,891**	**689,298***

*Revised

1975		1976		1977		1978		1979		
NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	PRODUCTS
										KITCHEN ELECTRICS
–	–	3,100	46,500	2,590	33,670	2,600	31,200	2,390	28,680	**Bag Sealers**
4,000	92,000	4,490	98,780	5,250	120,750	5,660	113,200	5,025	105,525	**Blenders**
2,006	66,314	2,156	73,770	2,150	75,550	2,280	99,000	2,423	118,779	**Broilers, Total**
790	37,130	606	27,270	450	21,150	460	25,300	464	30,624	With Rotisseries
1,216	29,184	1,550	46,500	1,700	54,400	1,820	63,700	1,959	88,155	Without Rotisseries
5,120	71,734	5,475	82,059	5,550	86,600	5,660	77,860	5,520	73,947	**Can Openers, Total**
2,918	32,098	3,138	37,656	3,050	36,600	3,060	33,660	2,951	35,412	Single Units
2,202	39,636	2,337	44,403	2,500	50,000	2,600	44,200	2,569	38,535	Combination Units
10,656	242,420	13,693	316,355	9,970	239,680	10,500	265,000	12,104	298,280	**Coffeemakers, Total**
4,538	90,760	3,970	75,430	2,180	34,880	2,200	37,400	2,906	50,855	Automatic (1-16 cup)
1,118	24,596	1,075	24,725	790	15,800	775	17,050	921	23,946	Party Perc (Over 16 cup)
5,000	127,064	8,648	216,200	7,000	189,000	7,525	210,700	8,277	223,479	ADC
2,430	29,062	2,468	33,318	3,071	43,403	3,600	65,400	5,280	129,791	**Cornpoppers, Total**
1,789	23,374	1,851	27,765	2,252	36,032	2,200	37,400	2,497	49,940	Buttering
632	5,688	617	5,553	819	7,371	1,400	28,000	2,783	79,851	Non-Buttering
–	–	1,000	17,000	625	8,750	500	6,000	364	4,732	**Crepe Pans**
425	5,525	430	6,020	440	7,040	440	6,600	460	6,900	**Egg Cookers**
440	7,920	329	5,264	250	4,000	250	3,500	215	4,945	**Fondues, Electric**
–	–	221	33,150	700	59,500	2,000	120,000	2,653	161,333	**Food Processors**
–	–	400	20,000	410	18,450	500	30,000	523	26,673	**Food Slicers**
2,611	88,774	2,613	94,068	2,500	87,500	2,600	93,600	2,709	102,942	**Frypan—Skillets**
640	17,920	715	20,735	625	16,875	646	18,088	661	21,152	**Griddles/Quick Grills**
740	14,800	750	15,750	735	15,435	761	15,220	803	20,075	**Hotplates & Buffet Ranges**
–	–	1,150	22,400	1,262	26,502	1,333	33,325	1,306	25,467	**Ice Cream Makers**
132	2,112	160	2,880	200	3,800	177	3,540	188	3,760	**Ice Crushers**
7,883	187,314	8,003	213,882	8,736	236,232	10,451	298,039	10,340	286,590	**Irons, Total**
7,086	177,150	7,311	204,708	8,150	228,200	9,865	289,625	9,795	278,395	Steam & Steam/Spray
600	7,800	514	6,682	379	4,927	376	5,264	350	5,075	Automatic Dry
197	2,364	178	2,492	207	3,105	210	3,150	195	3,120	Travel
1,577	29,963	1,700	28,900	1,700	23,800	1,700	27,200	1,692	28,764	**Knives, Electric Slicing**
4,477	105,786	5,105	128,545	5,095	122,675	5,175	131,745	5,568	155,850	**Mixers, Food, Total**
900	41,400	1,305	63,945	1,250	65,000	1,255	69,025	1,457	85,963	Stand Type
3,577	64,386	3,800	64,600	3,845	57,675	3,920	62,720	4,111	69,887	Portable Hand
6,500	156,000	8,440	202,560	7,950	190,800	6,700	140,700	5,641	107,179	**Slow Cookers**
6,204	143,846	7,397	176,738	7,400	189,500	8,100	219,600	8,916	252,136	**Toasters, Total**
3,260	58,680	3,800	72,200	3,600	68,400	4,000	80,000	4,576	91,920	Two-Slice
1,507	39,182	1,686	47,208	1,700	47,600	1,800	52,200	1,752	52,560	Four-Slice
1,437	45,984	1,911	57,330	2,100	73,500	2,300	87,400	2,588	107,656	Toaster-Ovens
1,028	19,532	1,100	18,700	1,058	19,044	1,034	17,578	1,119	24,618	**Waffle Irons/Sandwich Grills**
617	13,574	540	10,800	500	10,000	550	24,750	578	22,542	**Woks, Electric**
57,486	**1,294,596**	**71,435**	**1,668,174**	**68,767**	**1,639,556**	**73,217**	**1,841,145**	**76,478**	**2,011,160**	**Total Kitchen Electrics**
										AIR TREATMENT
9,236	238,202	10,056	259,464	10,515	285,195	11,648	346,200	12,449	484,805	**Fans, Total**
1,090	17,440	976	17,568	1,000	18,400	1,020	20,400	1,265	44,275	Desk & Bracket
335	8,165	313	6,573	315	7,245	328	8,200	362	14,480	Hassock or Floor
2,270	56,750	2,685	64,400	2,700	75,600	3,000	84,000	3,000	96,000	Exhaust, Built-In
1,377	53,703	1,866	74,640	2,000	80,000	2,500	105,000	2,500	120,000	Range Hoods
3,444	89,544	3,667	88,008	3,950	94,800	4,300	116,100	4,756	190,240	Window
700	12,600	549	8,235	550	9,350	500	12,500	566	19,810	Roll-About
2,990	69,904	2,748	69,448	4,120*	113,720*	4,467	123,449	4,457	138,108	**Portable Electric Heaters, Total**
2,272	49,984	2,284	54,816	3,600*	97,200*	3,887	104,949	3,805	114,150	Fan-Forced
180	3,780	88	1,848	120*	2,520*	140	2,660	207	3,933	Non-Fan-Forced
538	16,140	376	12,784	400*	14,000*	440	15,840	445	20,025	Baseboard
1,031	82,480	1,246	105,910	1,200*	108,000*	940	84,600	850	80,750	**Humidifiers**
850	8,500	1,025	9,225	1,140	11,400	1,200	12,000	1,400	14,000	**Vaporizers**
14,107	**399,086**	**15,075**	**444,047**	**16,975***	**518,315***	**18,255**	**566,249**	**19,156**	**717,663**	**Total Air Treatment**
										FLOOR CARE
940	14,100	1,068	13,884	1,160	17,400	1,200	21,600	1,300	26,000	**Carpet Sweepers**
530	18,550	566	20,942	530	21,200	520	23,400	512	27,136	**Floor Polishers**
7,650	656,500	8,767	852,494	8,705	996,680	8,965	1,090,500	8,922	1,154,559	**Vacuum Cleaners, Total**
3,100	310,000	3,600	432,000	3,194	447,160	3,270	523,200	3,094	541,450	Canisters
3,500	315,000	4,050	384,750	4,211	505,320	4,160	520,000	4,200	558,600	Upright
1,050	31,500	1,117	35,744	1,300	44,200	1,535	47,300	1,628	54,509	Lightweight
9,120	**689,150**	**10,401**	**887,320**	**10,395**	**1,035,280**	**10,685**	**1,135,500**	**10,734**	**1,207,695**	**Total Floor Care**

*Revised

HOUSEWARES HIGHLIGHTS

Analysis:

Every housewares classification had at least one high spot last year but, in fairness, the highlights section will lead off with the four categories which were added to the 10-Year Tables in 1978—cookware, clocks, home security and outdoor products.

Last year marks the seventh year that *Merchandising* has been compiling cookware statistics—it was a lucky number for the category. Unit shipments surpassed the 100-million mark with a retail value of $1.35 billion.

Of this total, the Metal Cookware Mfrs. Assn. reports an 18% sales increase for domestic cookware/bakeware compared to 1978. At factory billing, this totaled $626 million or approximately $1.2 billion retail. Of the total, MCMA found that aluminum cookware, both stamped and cast, accounted for 58.4%, compared with 53.5% in 1978. Stainless steel represented 33% compared to 37.9% in 1978.

As these are dollar figures there are two factors that explain the change. SilverStone, Du Pont's premium nonstick surface, was and continues to be a "hot" ticket and it increases the price of aluminum cookware.

While the above may have cut into stainless steel sales slightly, the biggest culprit here is the low-end, look-alike stainless steel pots and pans imported duty-free from developing countries.

This is reflected in *Merchandising*'s 1979 figures which show stainless steel shipments almost two million units ahead of 1978.

The Association's report noted that in 1980, U.S. producers expect to sell $670 million of metal cookware/bakeware at factory billing which equals about $1.3 billion at retail.

The growth of quartz clocks in the past two years is charted on this page for the first time. Unit shipments of alarms were up 105%; decorative wall models rose 73%; accounting for the fewest number—less than 500,000—desk/table/occasional models had a 74% increase and kitchen wall clocks held a strong fourth place with a 61% gain.

Clocks by power source indicate that quartz models accounted for almost 98% of all battery units shipped in 1979.

While all sources of power for clocks have been affected by quartz models, it would appear the latter also accounted for many add-on sales in the industry last year.

Unit shipments of digital clocks increased by more than 1.5 million from 1978 through 1979. Solid-state models accounted for about 3.5 million units and the mechanical leaf the remainder.

Unit shipments of intrusion detectors almost doubled in 1979 vs. 1978. Last year a total of 475,000 units were shipped, compared to 250,000 in the previous year.

Of the four products which make up the home security category, fire extinguishers were the only other item to post a gain, going from 4.5 million in 1978 to 5 million in 1979.

Smoke detectors, off more than one million units, showed an average price drop from about $20 to $14, reflecting the price erosion most retailers and many manufacturers had reported.

While the drop in total units of smoke/fire/intrusion systems was only 17,000, the retail value dropped to just under half that of 1978. This reflects a shift from the very sophisticated high-end electronic systems that require professional installation to the new wireless systems that begin at around $200 and, even with add-ons to protect a sizeable house against intruders and fire, rarely exceed $500-$600.

Snow thrower shipments for 1979 posted a 6.6 million unit gain over the previous year. Over one million snow throwers—almost 800,000 single-stage models—were shipped. With the relatively snow-free, mild winter in most of the snow-belt, however, one wonders how much of the $390.9 million value at retail was actually rung up.

A break-down of charcoal barbecue grills which account for the bulk of units sold, reveals braziers up 8% over 1978 to a total of 1.3 million. Smokers were up 6% and hibachis, 1%. No change was reported for fireplace grills, while wagons went down 4% and picnic grills were off 3%.

Line grass trimmers almost doubled in units, going from 4.4 million in 1978 to 7.3 million in 1979 and more than double in retail value indicating a slightly higher average unit price.

Deep fryers, not included in the 10-Year Tables, posted a gain of just under 100,000 units over 1978. However, regular-size deep fryers went ahead by almost half-a-million units at the expense of mini-fryers. They, like hamburger makers and donut makers, have lost consumer appeal.

The biggest excitement in kitchen electrics in 1979 was furnished by the hot air cornpopper. Units jumped from 800,000 to over 2 million with a retail value of $69.8 million.

This increase, along with a slight gain in the oil-type poppers, put the appliance in seventh place among the 23 kitchen electrics listed in the 10-Year Tables, ahead of blenders.

Food processors, with a 653,000 unit shipment increase over 1978, completed the top 10 kitchen electrics for 1979.

Full-feature lightweight irons accounted for 1.4 million of the almost 10 million steam & steam/spray irons shipped in 1979.

Toaster-ovens with broiler features totaled 1.7 million of the almost 2.6 million toaster-ovens shipped.

Another highlight reflecting the success of SilverStone is that non-stick cookware shipments rose from 25% in 1978 to 41% in 1979.

One of the hottest personal care products in 1979 was the curling brush. The industry reports 875,000 units shipped with a retail value of $10.5 million.

A first-time breakout of electronic digital scales from the regular-type puts units shipped last year at 790,000 at a $34.8 million retail value.

Most of the other products highlighted on these pages posted increases over 1978. In fact, the bottom line for housewares for all kinds was positively bright considering the dark economic picture painted for the year. ●

LIGHTWEIGHT VACUUM SHIPMENTS

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
Sticks	1,275	44,625	1,275	40,800
Hand-Held	353	9,884	260	6,500
TOTAL	1,628	54,509	1,535	47,300

LINE GRASS TRIMMERS

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
TOTAL	7,250	290,000	4,400	110,000

CHARCOAL GRILL SHIPMENTS

	1979 Units (000)	1978 Units (000)	% Change 1979/78
Braziers	1,300	1,210	+8
Fireplace	13	13	N.C.
Hibachis	2,330	2,295	+1
Picnic Grills	3,602	3,726	-3
Smokers	2,345	2,217	+6
Wagons	278	289	-4
TOTAL	9,868	9,750	+1

DIGITAL CLOCK SHIPMENTS BY TYPE

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
Solid State	3,447	50,024	2,502	32,181
Mech. Leaf	1,775	16,675	1,072	10,720
TOTAL	5,222	66,699	3,574	42,901

QUARTZ CLOCK SHIPMENTS BY TYPE

	1979 Units (000)	1978 Units (000)	% Change 1979/1978
Decorative Wall	2,792	1,612	+ 73
Kitchen Wall	2,828	1,758	+ 61
Alarm	4,180	2,041	+105
Desk/Table/Occasional	457	263	+ 74
TOTAL	10,257	5,674	+ 81

CLOCKS BY POWER SOURCE

TYPE		1979 (000)				1978 (000)			
		Electric	Battery	Key-Wind	TOTAL	Electric	Battery	Key-Wind	TOTAL
DECORATIVE WALL	Units	1,867	2,908	291	5,066	1,742	2,395	340	4,477
	Dollars	37,768	152,723	4,337	194,828	29,614	119,750	3,400	152,764
KITCHEN WALL	Units	3,302	2,982	–	6,284	3,340	2,721	–	6,061
	Dollars	41,625	40,697	–	82,322	33,396	32,652	–	66,048
ALARM	Units	6,688	4,180	3,549	14,417	7,235	2,041	3,480	12,756
	Dollars	48,555	34,485	36,106	119,146	47,145	15,552	34,682	97,379
DESK/TABLE/ OCCASIONAL	Units	165	472	260	897	121	326	246	693
	Dollars	2,417	10,896	7,885	21,198	1,815	8,150	5,904	15,869
TOTAL	Units	12,022	10,542	4,100	26,664	12,438	7,483	4,066	23,987
	Dollars	130,365	238,801	48,328	417,494	111,970	176,104	43,986	332,060

KITCHEN ELECTRIC/ PERSONAL CARE HIGHLIGHTS

TOTAL KITCHEN ELECTRIC VOLUME, IN UNITS

	1979		1978	
Product	Units (000)	% Of Total	Units (000)	% Of Total
BAG SEALERS	2,390	3.1	2,600	3.6
BLENDERS	5,025	6.6	5,660	7.7
BROILERS	2,423	3.2	2,280	3.1
CAN OPENERS	5,520	7.2	5,660	7.7
COFFEE MAKERS	12,104	15.8	10,500	14.3
CORNPOPPERS	5,280	6.9	3,600	4.9
CREPE PANS	364	0.5	500	0.7
EGG COOKERS	460	0.6	440	0.6
FONDUES, ELECTRIC	215	0.3	250	0.3
FOOD PROCESSORS	2,653	3.5	2,000	2.7
FOOD SLICERS	523	0.7	500	0.7
FRYPANS/SKILLETS	2,709	3.5	2,600	3.6
GRIDDLES/QUICK GRILLS	661	0.9	646	0.9
HOTPLATES & BUFFET RANGES	803	1.0	761	1.0
ICE CREAM MAKERS	1,306	1.7	1,333	1.8
ICE CRUSHERS	188	0.2	177	0.2
IRONS	10,340	13.5	10,451	14.3
KNIVES, ELECTRIC	1,692	2.2	1,700	2.3
MIXERS	5,568	7.3	5,175	7.1
SLOW COOKERS	5,641	7.4	6,700	9.2
TOASTERS	8,916	11.6	8,100	11.1
WAFFLE IRONS/SANDWICH GRILLS	1,119	1.5	1,034	1.4
WOKS, ELECTRIC	578	0.8	550	0.8
TOTAL	76,478	100.0%	73,217	100.0%

TOTAL PERSONAL CARE PRODUCT VOLUME, IN UNITS

	1979		1978	
Product	Units (000)	% Of Total	Units (000)	% Of Total
BED COVERINGS	5,125	10.2	4,900	9.9
CURLING IRONS/STYLING WANDS	6,463	12.9	6,200	12.5
FACIAL SAUNAS	550	1.1	440	0.9
HAIR DRYERS	18,488	36.8	18,970	38.3
HAIR SETTERS	2,382	4.7	1,989	4.0
HEATING PADS	4,100	8.2	3,940	8.0
HOT LATHER DISPENSERS	1,225	2.4	1,590	3.2
MAKE-UP MIRRORS	1,633	3.2	1,490	3.0
MASSAGERS, HAND-HELD	830	1.7	798	1.6
MASSAGERS, SHOWER	1,885	3.7	2,035	4.1
SHAVERS	5,960	11.9	5,650	11.4
TOOTHBRUSHES, ELECTRIC	524	1.0	540	1.1
WATER PULSATORS	1,126	2.2	1,000	2.0
TOTAL	50,291	100.0%	49,542	100.0%

KITCHEN ELECTRICS/ PERSONAL CARE

(continued)

DEEP FRYER SHIPMENTS

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
Mini	1,710	27,360	2,050	32,800
Regular	1,108	27,700	683	17,075
TOTAL	2,818	55,060	2,733	49,975

CORNPOPPER SHIPMENTS

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
Oil	3,163	59,930	2,800	41,400
Hot Air	2,117	69,861	800	24,000
TOTAL	5,280	129,791	3,600	65,400

COFFEE GRINDER SHIPMENTS

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
TOTAL	368	6,624	382	6,494

STEAM & STEAM/SPRAY IRON SHIPMENTS

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
Full-Feature Lightweight	1,415	35,375	1,265	31,625
Standard	8,380	243,020	8,600	258,000
TOTAL	9,795	278,395	9,865	289,625

HAIR SETTER SHIPMENTS

	1979 Units (000)	1978 Units (000)	% Change 1979/1978
Dry	604	514	+18
Mist	1,778	1,475	+21
TOTAL	2,382	1,989	+20

CURLING BRUSHES

	1979 (000)	
	Units	Retail Value
TOTAL	875	10,500

CURLING IRONS/STYLING WANDS

	1979 (000)	
	Units	Retail Value
Dry	4,075	32,600
Mist	2,388	26,268
TOTAL	6,463	58,868

DONUT MAKER SHIPMENTS

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
2-DONUT	272	3,808	500	7,000
4-DONUT	136	2,176	200	3,200
6-DONUT	212	3,816	300	5,400
TOTAL	620	9,800	1,000	15,600

OMELET PAN SHIPMENTS

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
TOTAL	254	5,080	253	5,060

TOASTER-OVEN/BROILER SHIPMENTS

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
TOTAL	1,700	74,800	1,500	58,500

YOGURT MAKER SHIPMENTS

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
TOTAL	641	7,051	700	8,400

TOTAL HOUSEWARES UNIT VOLUME

	1979		1978	
PRODUCT	Units (000)	% of Total	Units (000)	% of Total
AIR TREATMENT	19,156	6.0	18,255	6.1
CLOCKS	26,664	8.3	23,987	8.0
COOKWARE & BAKEWARE	106,723	33.2	91,534	30.7
FLOOR CARE	10,734	3.3	10,685	3.6
HOME SECURITY	12,308	3.8	13,500	4.5
KITCHEN ELECTRICS	76,478	23.8	73,217	24.5
OUTDOOR	19,232	6.0	17,805	6.0
PERSONAL CARE	50,291	15.6	49,542	16.6
TOTAL	321,586	100.0	298,525	100.0

FACE & BODY SKIN CLEANER SHIPMENTS

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
TOTAL	865	8,218	1,000	11,000

NAIL CARE DEVICES

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
TOTAL	1,325	13,913	1,200	13,200

BATHROOM SCALES TOTAL

	1979 (000)		1978 (000)	
	Units	Retail Value	Units	Retail Value
Electronic Digital	790	34,760	–	–
Regular	7,316	80,110	–	–
TOTAL	8,106	114,870	7,152	69,732

HOUSEWARES HIGHLIGHTS

MICROWAVE COOKWARE SHIPMENTS

	1979 Units (000)	1978 Units (000)	% Change 1979/1978
CERAMIC	3,678	3,000	+23
CHINA & COATED PAPER	777	600	+30
GLASS	3,694	2,900	+27
PLASTIC	5,483	4,900	+12
STONEWARE	2,074	2,300	-10
TOTAL	15,706	13,700	+15

PRESSURE COOKER SHIPMENTS BY TYPE

	1979		1978	
	Units (000)	Retail Value (000)	Units (000)	Retail Value (000)
ELECTRIC	325	15,275	350	16,100
NON-ELECTRIC	2,500	75,000	2,100	63,000
TOTAL	2,825	90,275	2,450	79,100

CANISTER SET SHIPMENTS

1979 (000)		1978 (000)	
Units	Retail Value	Units	Retail Value
4,060	44,600	3,850	46,200

DISH DRAINER SHIPMENTS

1979 (000)		1978 (000)	
Units	Retail Value	Units	Retail Value
6521	21,193	6,362	22,267

ICE BUCKET SHIPMENTS

1979 (000)		1978 (000)	
Units	Retail Value	Units	Retail Value
1,275	11,794	1,250	11,625

WASTEBASKET SHIPMENTS

1979 (000)		1978 (000)	
Units	Retail Value	Units	Retail Value
11,871	47,484	11,825	47,300

PLASTIC ORGANIZER SHIPMENTS

1979 (000)		1978 (000)	
Units	Retail Value	Units	Retail Value
29125	101,938	28,050	98,175

SOAP DISH SHIPMENTS

1979 (000)		1978 (000)	
Units	Retail Value	Units	Retail Value
2,975	1,845	2,500	1,625

NON-STICK COOKWARE SHIPMENTS

1979	1978
41%	25%

10-Year Tables: Electronics Analysis

Video Entertainment

Color television recorded a pretty good year in 1979 considering that it had to be compared to 1978—when the industry put together the best year in its history.

Actually, it was a fairly typical year with some classy new product introductions (remote control was bigger than ever and the industry started talking seriously about—and showing—stereo tv models), price cuts, price hikes, stronger than ever promotions by many manufacturers, including the proverbial rebates and massive network tv ad campaigns.

Increasingly, color set sales went to the replacement and second-set market and that should continue. The same holds true with remote control models with sales of these sets accounting for something like 25% of the color mix during the year, according to several industry reports.

To the surprise of even some of the industry's top marketing mavens, black-and-white models continued to sell well, particularly the small portable combos.

Shipments dropped

Color set shipments dropped to 9,793,000 units (from 10,236,000 the previous year, which was an industry record), and the retail value of these sets suffered as well—$4,617,829,000 versus $4,992,654,000 in '78.

Color portable and table models generally sold more strongly than did consoles and combos, although the latter category continues to show strength and is favored by both manufacturer and retailer alike because of healthier margins.

In black-and-white, unit shipments in 1979 topped '78 overall, despite a big drop in monochrome console and combo sales.

Videocassette recorder activity was up significantly in 1979, but nothing like what had been anticipated by industry marketers. Still, it's a new and burgeoning market and bound to continue growing as new models, priced both higher and lower—are introduced and promoted.

In actual numbers, sales to dealers during 1979 were 478,000 units, valued at $431,292,000. This compares with 402,000 unit shipments in the previous year, valued at $356,480,000.

Of particular interest to a growing body of consumers have been the programmable, extended play (up to six hours), and portable models. In fact, programmable models account for at least half of all VCR sales and this ratio is expected to increase rapidly in favor of the more advanced units.

Better distribution

Another reason for optimism is that distribution is broadening, boosting consumer exposure and interest.

Projection, or wide-screen, tv also continued its measured growth in 1979. Industry shipments rose to an estimated 63,000 units versus 54,000 in '78 and demonstrated its high-end sales potential by recording a retail value of $182,700,000, up from $124,200,000 in '78.

Surprising to some, the great majority of projection tv systems are being sold for home use (about 85% of all sales), normally to an upscale consumer—one with plenty of adult toys at home.

The tv games market is foundering somewhat, possibly at the expense of other video products (such as VCR) and non-video electronic games. But it remains a market of some size; 1,685,000 units were shipped in 1979, valued at $105,955,000 at retail. •

Autosound

The autosound market picked up a little speed during 1979.

Despite some losses in a few 8-track categories, car stereo unit sales climbed from 8,655,000 in 1978 to 9,130,000 last year. The big winner was in-dash models, mainly in-dash cassette radio combos (up from 1.7 million in '78 to 2.2 million in '79) as consumers became better tuned in to what's available.

More younger and older car and truck owners are putting out their hard earned cash for step-up systems, including better speakers and accessories. Dealers also claim they're seeing more women shoppers. And new car dealers find that it's getting easier—despite generally poor car sales through much of last year—to interest new car buyers in something other than a factory radio.

Indeed, as the market continued to warm up, manufacturers took more of an interest in product development. The year saw smaller, more highly featured new car stereos, better speakers and accessories.

The fact that several "brand name" audio/hifi manufacturers entered the market, backed up impressive advertising and promotional budgets, didn't actually hurt the market either, although it may have taken the edge off someone's market share.

CB remains a problem, although it's a viable market for those who have elected to stick by it with new products and promotions. Overall, CB unit sales fell to 1,590,000 in '79, down from 4,736,000 the previous year.

Particularly hard hit were CB base stations. Sales of these units dropped to 190,000 last year from 686,000 in 1978.

All 8-track models were off in unit sales in '79 with in-dash models being the least hard hit. •

10-Year Tables: Electronics Analysis

Audio/Hifi/Tape

Audio/hifi, but mainly hifi, went through some trauma during 1979.

Unit shipments and the value of these shipments were up—not by much, but they were up—all in the face of tougher competition within the industry, higher product development and promotional costs, dealer failures and more competition than ever for consumers' discretionary dollars.

In hifi, every component product category showed an increase in 1979 over '78, although it was slight in a few cases.

In compacts, unit sales were off overall during the year. As for portable tape, overall unit shipments were up slightly only because a swiftly declining 8-track market tended to pull down the entire category.

Cassette decks good

Tape decks were up overall, although 8-track, console stereo and open reel models—in decline during the year—took the edge off good cassette unit sales.

All radios were down in both unit shipments and retail value. Least impacted were clock radios with shipments off to 10,200,000 from 10,707,000 in 1978.

Separates gain impressively

Separates, such as amplifiers, preamplifiers and tuners, made the most impressive unit shipment gains in 1979, climbing to 417,000 versus 370,000 in '78. Increases in other components weren't quite as healthy.

Cassette trimode compacts recorded the best increase in compact systems, jumping to 1,235,000 (up from 330,000 in '78). But with so many 8-track products to contend with, the compact systems market overall dropped to 4,341,000 in 1979 from 4,474,000 the previous year.

Broader consumer interest

Against this background, more manufacturers and retailers have been working hard to strengthen their position in the market and to broaden consumer interest in audio/hifi.

Saddled for years with what seemed to be unyielding buyer demographics, the hifi makers in particular have been trying to "break out" via appeals to younger, older and women buyers. Admittedly, they're having a tough time of it, but they're going to keep trying.

Meanwhile, compact systems prices are coming closer to hifi components packages, and portable tape models are beginning to embody most, if not all, of the features of the larger, more expensive recorder/player cassette versions and sound better year-to-year.

But, of course, everyone knows all this. •

Personal Electronics

Every type of calculator increased in unit shipments in 1979 over the previous year. This wasn't necessarily true, however, in retail value.

Shipments of mini-card calculators, for example, increased to 2,598,000 units in 1979, up from 2,050,000 in '78. But the retail value (dollars) of '79 mini-card models dropped to $57,156,000 from $61,500,000 the previous year.

This was also true in all types of desktop calculator models (display only, printer only and printer/display). Whereas unit shipments were up in 1979 over '78, the retail value of these shipments dropped noticably last year, down to $350,000,000 from $419,850,000 in 1978.

The biggest drop in the value of retail shipments came in programmable hand-helds. Although unit shipments of these models climbed slightly to 82 million from 75 million units in 1978, their retail value dropped to $13,530,000 from $13,875,000, according to Commerce Dept. data.

Overall, 24,978,000 calculators (both hand-helds and desktops) were shipped in the U.S. in 1979, valued at $775,923,000. This compares to shipments of 23,341,000 valued at $1,039,464,000 in 1978.

Digital watches fared well in 1979, too, although sales of the LED display types dropped considerably at the expense of the increasingly popular LCD models. Hardest hit were the women's LED styles, and this was a big factor in LCDs cutting into LED sales.

Also, despite continued interest in some of the multi-featured digitals (chronograph and calculator models in particular), the electronic analogs—heavily promoted during the year—are gaining in popularity and this tended to undercut some digital sales.

Specifically, LCD model shipments climbed to 16,750,000 units (up from 11,500,000 in 1978), valued at $611,250,000 (up from $517,500,000 in '78).

Overall, digital watch shipments totaled 19,717,000 versus 17,750,000 the previous year.

Telephone answering devices is another area which saw growth in shipments but not dollars. Unit shipments climbed to 495,000 in 1979 from 400,000 in '78 as the value of these products at retail dropped to $80,685,000 in '79 from $84,000,000 in '78. •

TEN YEAR TABLES:

Product Sales Growth & Performance

PRODUCTS	1970		1971		1972		1973		1974	
	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)
VIDEO										
TV, B&W, Total	4,546	610,686	4,874	637,400	8,145	1,008,270	7,033	861,527	5,941	679,792
Portable & Table	4,172	534,016	4,530	561,720	7,851	942,120	6,787	807,653	5,791	648,592
Console & Combo	374	76,670	344	75,680	294	66,150	246	53,874	150	31,200
TV, Color, Total	4,822	2,478,927	6,181	3,249,805	8,378	4,196,970	9,263	4,162,987	7,830	3,637,200
Portable & Table	2,419	943,410	3,461	1,470,925	5,340	2,237,460	6,081	2,304,699	5,304	2,121,600
Console & Combo	2,403	1,535,517	2,720	1,778,880	3,038	1,959,510	3,182	1,858,288	2,526	1,515,600
TV, Projection	–	–	–	–	–	–	–	–	–	–
Videocassette Recorders	–	–	–	–	–	–	–	–	–	–
TV Games	–	–	–	–	–	–	–	–	–	–
AUDIO/HIFI										
Components, Total	–	–	–	–	–	–	–	–	9,991	1,007,765
Receivers	–	–	–	–	–	–	–	–	960	336,000
Amps, Pre-Amps, Tuners	–	–	–	–	–	–	–	–	231	69,300
Turntables (Excluding OEM)	–	–	–	–	–	–	–	–	1,767	167,865
Cartridges (Excluding OEM)	–	–	–	–	–	–	–	–	2,533	64,000
Speakers (Components Only)	–	–	–	–	–	–	–	–	2,500	300,000
Headphones	–	–	–	–	–	–	–	–	2,000	70,000
Compact Systems, Total†	–	–	–	–	–	–	–	–	3,427	–
Cassette Bimode	–	–	–	–	–	–	–	–	32	–
8-Track Player Bimode	–	–	–	–	–	–	–	–	652	–
8-Track Player Trimode***	–	–	–	–	–	–	–	–	1,234	–
8-Track Recorder Bimode	–	–	–	–	–	–	–	–	549	–
Changer Bimode***	–	–	–	–	–	–	–	–	377	–
8-Track Recorder Trimode***	–	–	–	–	–	–	–	–	480	–
Cassette Trimode***	–	–	–	–	–	–	–	–	103	–
Portable Tape, Total	–	–	–	–	–	–	–	–	11,128	505,832
Cassette	–	–	–	–	–	–	–	–	9,844	423,292
8-Track Players	–	–	–	–	–	–	–	–	1,174	70,440
8-Track Recorders	–	–	–	–	–	–	–	–	110	12,100
Tape Decks, Total	–	–	–	–	–	–	–	–	421	125,295
Cassette	–	–	–	–	–	–	–	–	244	59,780
8-Track	–	–	–	–	–	–	–	–	80	11,680
Open Reel	–	–	–	–	–	–	–	–	97	53,835
Console Stereo**	1,087	358,710	1,023	322,245	949	302,731	923	280,592	837	244,404
Radios, Total	34,049	681,519	34,105	690,730	42,149	800,932	37,652	777,918	33,230	723,570
Table	5,714	165,706	4,760	123,760	4,926	123,150	3,023	81,621	2,764	80,156
Portable	23,461	398,837	22,885	411,930	29,749	475,984	24,204	435,672	21,292	340,672
Clock	4,874	116,976	6,460	155,040	7,474	201,798	10,425	260,625	9,174	302,742
AUTO SOUND										
Autosound, Total	–	–	–	–	–	–	–	–	5,504	478,848
UD 8-Track Player	–	–	–	–	–	–	–	–	2,088	–
UD 8-Track/Radio Combo	–	–	–	–	–	–	–	–	846	–
ID 8-Track/Radio Combo	–	–	–	–	–	–	–	–	816	–
UD Cassette Player	–	–	–	–	–	–	–	–	591	–
UD Cassette/Radio Combo	–	–	–	–	–	–	–	–	248	–
ID Cassette/Radio Combo	–	–	–	–	–	–	–	–	323	–
Radios Only (Retrofit)	–	–	–	–	–	–	–	–	592	–
Radios, Citizens Band, Total	–	–	–	–	–	–	–	–	1,750	343,000
Base Units	–	–	–	–	–	–	–	–	175	43,750
Mobile Units	–	–	–	–	–	–	–	–	1,575	299,250
BLANK TAPE										
Blank Tape, Total	–	–	–	–	–	–	–	–	185,901	290,395
Audio	–	–	–	–	–	–	–	–	–	–
Cassette	–	–	–	–	–	–	–	–	148,767	208,274
Open Reel	–	–	–	–	–	–	–	–	11,567	33,544
8-Track	–	–	–	–	–	–	–	–	25,567	48,577
Video	–	–	–	–	–	–	–	–	–	–
CALCULATORS										
Calculators, Total	–	–	–	–	–	–	–	–	14,280	1,349,000
Hand-Held, Total	–	–	–	–	–	–	–	–	12,030	709,000
Mini-Card	–	–	–	–	–	–	–	–	–	–
Printer	–	–	–	–	–	–	–	–	–	–
Programmable	–	–	–	–	–	–	–	–	30,000	9,000
Other	–	–	–	–	–	–	–	–	–	–
Desk-Top, Total	–	–	–	–	–	–	–	–	2,250	640,000
Display Only	–	–	–	–	–	–	–	–	1,050	150,000
Printer Only	–	–	–	–	–	–	–	–	1,120	450,000
Printer/Display	–	–	–	–	–	–	–	–	80	40,000
DIGITAL WATCHES										
Digital Watches, Total	–	–	–	–	–	–	–	–	667	66,700
LED	–	–	–	–	–	–	–	–	200	–
LCD	–	–	–	–	–	–	–	–	467	–
TEL. ANS. DEVICES	–	–	–	–	–	–	–	–	–	–

* Revised ** Included combinations 1970-1978; now included only under TV

*** Includes Changer † All Units Include Stereo Radio

MANUFACTURER SHIPMENTS OF PRODUCTS FOR SALE IN THE UNITED STATES WHETHER U.S. OR FOREIGN MADE

HOME and AUTO ELECTRONICS

1975		1976		1977		1978		1979		
NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	NUMBER SHIPPED (000)	RETAIL VALUE (000)	PRODUCTS
										VIDEO
4,968	529,160	5,196	567,430	5,664	650,913	6,064	701,134	6,281	681,867	**TV, B&W, Total**
4,888	513,240	5,134	554,472	5,617	640,338	6,030	693,450	6,258	675,864	Portable & Table
80	15,920	62	12,958	47	10,575	34	7,684	23	6,003	Console & Combo
6,485	3,270,926	7,700	3,933,156	9,107	4,438,234	10,236	4,992,654	9,793	4,617,829	**TV, Color, Total**
4,403	1,919,708	5,428	2,415,460	6,600	2,778,600	7,618	3,207,178	7,530	3,094,830	Portable & Table
2,082	1,351,218	2,272	1,517,696	2,507	1,659,634	2,618	1,785,476	2,263	1,522,999	Console & Combo
7	–	12	26,400	20	38,000	54	124,200	63	182,700	**TV, Projection**
–	–	43	51,600	225	247,500	402	356,480	478	431,292	**Videocassette Recorders**
350	–	3,550	150,500	5,420*	263,550*	2,585	163,075	1,685	105,955	**TV Games**
										AUDIO/HIFI
10,105	1,017,339	10,891	1,142,529	12,045	1,323,775	13,190	1,497,340	14,425	1,666,375	**Components, Total**
970	306,000	1,050	341,250	1,185	392,235	1,320	442,200	1,450	398,750	Receivers
263	75,744	275	81,125	320	96,640	370	111,740	417	116,760	Amps, Pre-Amps, Tuners
1,709	179,445	1,866	222,054	2,015	251,875	2,200	281,600	2,433	316,290	Turntables (Excluding OEM)
2,533	64,600	2,600	67,600	3,000	81,000	3,200	89,600	3,500	98,000	Cartridges (Excluding OEM)
2,550	318,750	2,800	350,000	3,125	415,625	3,500	476,000	3,850	600,600	Speakers (Components Only)
2,080	72,800	2,300	80,500	2,400	86,400	2,600	96,200	2,775	135,975	Headphones
3,491	680,860	3,582	715,696	4,508*	914,896*	4,474	962,979	4,341	939,028	**Compact Systems, Total†**
36	5,760	38	6,260	45*	7,515*	53	9,275	73	14,162	Cassette Bimode
528	83,952	525	85,575	631*	104,115*	603	102,510	383	54,769	8-Track Player Bimode
798	158,802	843	171,972	1,081*	222,685*	1,038	221,094	777	140,637	8-Track Player Trimode***
590	108,560	555	102,675	685*	128,780*	600	120,000	417	79,230	8-Track Recorder Bimode
325	32,500	324	33,048	399*	41,496*	350	38,500	268	37,788	Changer Bimode***
1,024	244,736	1,100	267,300	1,397*	342,265*	1,500	382,500	1,188	283,932	8-Track Recorder Trimode***
190	46,550	197	48,856	270*	68,040*	330	89,100	1,235	328,510	Cassette Trimode***
10,240	486,893	11,182	531,485	12,239	584,735	13,198	680,991	13,407	674,475	**Portable Tape, Total**
8,663	381,172	9,546	419,400	10,500	462,000	11,600	568,400	12,250	600,250	Cassette
1,479	93,177	1,542	100,230	1,637	109,679	1,513	101,371	1,100	67,100	8-Track Players
98	12,544	94	11,855	102	13,056	85	11,220	57	7,125	8-Track Recorders
486	133,057	518	147,187	591	162,375	650	182,290	675	183,510	**Tape Decks, Total**
291	66,057	313	71,677	385	88,165	440	103,840	495	113,850	Cassette
87	13,000	90	13,410	97	15,132	95	15,200	72	10,800	8-Track
108	54,000	115	62,100	109	59,078	115	63,250	108	58,860	Open Reel
530	166,950	654	215,166	725	253,750	600	186,000	540	108,000	**Console Stereo****
25,276	614,942	31,656	821,719	41,800	1,168,000	32,478	1,056,190	28,550	918,750	**Radios, Total**
2,253	74,349	2,876	106,412	1,800	72,000	1,505	67,725	1,250	56,250	Table
16,382	294,876	21,427	428,540	28,000	616,000	20,266	506,650	17,100	393,300	Portable
6,641	245,717	7,353	286,767	12,000	480,000	10,707	481,815	10,200	469,200	Clock
										AUTO SOUND
6,484	540,421	6,776	608,018	8,644	824,062	8,655	888,080	9,130	1,081,225	**Autosound, Total**
1,895	85,275	1,735	78,075	1,900	87,400	1,600	78,400	1,300	78,000	UD 8-Track Player
860	66,220	500	38,560	555	43,845	500	41,000	500	48,000	UD 8-Track/Radio Combo
1,462	157,896	2,255	248,050	2,590	292,670	2,600	296,400	2,500	342,500	ID 8-Track/Radio Combo
665	49,210	560	44,240	750*	60,750*	700	58,800	775	58,900	UD Cassette Player
340	42,840	375	46,875	550*	70,400*	555	75,480	605	75,625	UD Cassette/Radio Combo
522	78,300	700	101,500	1,233*	183,717*	1,700	255,000	2,200	343,200	ID Cassette/Radio Combo
740	60,680	651	50,778	1,066*	85,280*	1,000	83,000	1,250	135,000	Radios Only (Retrofit)
4,500	816,300	11,280	1,976,220	7,182	571,620	4,736	393,260	1,590	130,210	**Radios, Citizens Band, Total**
675	154,575	1,820	405,860	1,005	201,000	686	109,760	190	24,885	Base Units
3,825	661,725	9,460	1,570,360	6,177	370,620	4,050	283,500	1,400	105,325	Mobile Units
										BLANK TAPE
203,844	348,552	230,700	400,433	249,090	478,282	268,500	805,100	244,753	686,931	**Blank Tape, Total**
–	–	–	–	246,090	436,282	263,000	710,100	234,786	511,259	Audio
162,156	251,342	186,500	296,535	200,000	324,000	220,000	564,000	203,986	399,509	Cassette
12,030	37,894	12,600	40,698	12,250	41,895	11,000	69,100	9,200	72,558	Open Reel
29,658	59,316	31,600	63,200	33,840	70,387	32,000	77,000	21,600	39,192	8-Track
–	–	–	–	3,000	42,000	5,500	95,000	9,967	175,672	Video
										CALCULATORS
18,350	1,152,500	20,541	807,803	22,089	876,767	23,341	914,589	24,978	775,923	**Calculators, Total**
16,050	612,500	17,563	361,813	18,808	425,872	20,111	494,739	21,317	425,333	Hand-Held, Total
–	–	–	–	–	–	2,050	61,500	2,598	57,156	Mini-Card
–	–	–	–	–	–	475	41,800	573	47,559	Printer
50	12,500	63	11,813	69	13,614	75	13,875	82	13,530	Programmable
–	–	–	–	–	–	17,511	377,564	18,064	307,088	Other
2,300	540,000	2,978	445,990	3,281	450,895	3,230	419,850	3,661	350,590	Desk-Top, Total
900	105,000	1,068	85,440	886	62,020	930	60,450	946	56,760	Display Only
1,300	390,000	1,660	298,800	2,000	300,000	1,400	197,400	1,478	133,020	Printer Only
100	45,000	250	61,750	395	88,875	900	162,000	1,237	160,810	Printer/Display
										DIGITAL WATCHES
4,200	319,200	11,400	615,600	15,600	686,400	17,750	642,500	19,717	648,654	**Digital Watches, Total**
3,000	–	7,260	–	9,140	–	6,250	125,000	2,967	37,404	LED
1,200	–	4,140	–	6,460	–	11,500	517,500	16,750	611,250	LCD
275	–	225	33,750	300	60,000	400	84,000	495	80,685	**TEL. ANS. DEVICES**

Revised*

Included combinations 1970-1978; now included only under TV**

Includes Changer***

All Units Include Stereo Radio †

ELECTRONICS HIGHLIGHTS

TOTAL HOME ELECTRONICS VOLUME, IN UNITS	1979 Units (000)	% Of Total	1978 Units (000)	% Of Total
AUTOSOUND	9,130	10.3	8,655	9.4
COMPACT SYSTEMS	4,341	4.9	4,474	4.9
HI FI COMPONENTS (including Tape Decks)	15,100	17.0	13,840	15.0
PORTABLE TAPE	13,407	15.1	13,198	14.4
RADIOS	28,550	32.1	32.478	35.3
TV, B&W	6,281	7.1	6,064	6.6
TV, COLOR	9,793	11.0	10,236	11.1
TV GAMES	1,685	1.9	2,585	2.8
TV, PROJECTION	63	0.1	55	0.1
VIDEOCASSETTE RECORDERS	478	0.5	402	0.4
TOTAL	88,828	100.0%	91,987	100.0%

Analysis:

Color tv shipments were off in 1979, but not by much. Indeed, manufacturers were soothed somewhat by the fact that '79 sales levels had to be compared with the previous year—when an all-time record 10,236,000 color sets were sold.

Overall, some 9,793,000 color tv sets were shipped to dealers last year with gains reported in only one area, the 12- and 13-in. screen sizes. However, 18- and 19-in. models came very close to 1978 sales performances and 9-in. sets sold at virtually the same levels in '79 as in 1978.

Black-and-white tv sales were actually up in '79, from 6,064,000 to 6,281,000 sets. Most of the sales strength came in the 12-in. units, with additional gains by the mini combination tv/radio sets. Thirteen and 15-in. models were essentially flat in sales to dealers in 1979.

Screen size aside, most of the growth in monochrome tv was in AC/DC sets.

To their genuine delight, manufacturers have found that black-and-white tv has become an impulse item in some areas and that sales continue to hold up despite little or no national advertising.

Videotape recorders

VCR shipments were up, too, in 1979, but not nearly to the levels that had been anticipated. And in what seems to be a continuing trend in VCR, VHS format model sales grew to twice the Beta model levels in units.

Color video camera sales jumped to 43,000 units in '79, well above the 15,000 shipped in '78. Black-and-white cameras, on the other hand, dropped well off '78 shipments, down to 30,000 in '79 from a high of 46,000 the previous year.

Sales of tv games also were off in '79, possibly because of growth in non-video electronic games and even personal computer sales. The biggest impact was felt by the lower-end, non-programmable tv games.

Audio products

Hifi component shipments, including tape decks, were up, as were autosound and portable tape products. But radios were well off the '78 mark and compact systems were down.

One compact model type did show good growth, however. That was the so-called quadmode (receiver, turntable, cassette, 8-track player). Shipments of quadmodes more than doubled last year over 1978 to 123,000 units.

Car speaker pairs were up, too, climbing to 9,500,000.

Microcassette recorders also showed good growth as manufacturers perceived growing consumer awareness of the product.

Radios were off in 1979 with few exceptions and these were specialty models, such as multibands, scanners, digital clock radios.

Blank, prerecorded tape

In blank tape, both cassette and open reel shipments were down from the previous year. Also, shipments of metal particle blank audio cassettes are reported here for the first time.

While VCR hardware sales are up, they're not up quite so dramatically as shipments of prerecorded videocassettes. In this category, X-rated, or "adult" programs climbed 88% in '79 over '78, despite retail prices averaging close to $100 per copy. General material grew, too, up 62% last year.

Merchandising has also begun to track prerecorded videotape by format for the first time and in this area VHS is running ahead of Beta, but not very far ahead, possibly reflecting the head start in the marketplace by Beta format equipment. ●

AUDIO

QUADMODE

1979		1978	
Units (000)	Retail Value (000)	Units (000)	Retail Value (000)
123	39,483	60	19,500

CAR SPEAKER SHIPMENTS (IN PAIRS)

1979		1978	
Units (000)	Retail Value (000)	Units (000)	Retail Value (000)
9,500	437,000	9,200	395,600

BLANK CASSETTE SHIPMENTS BY TYPE

	1979 Units (000)	1978 Units (000)	% Change 1979/1978
Metal Particle Tape	226	–	–
Chromium Dioxide	6,538	9,000	-27
Ferrite Chrome	4,359	7,000	-38
*Premium Ferrite	98,073	90,000	+ 9
Promotional Ferrite	94,790	114,000	-17
TOTAL	203,986	220,000	- 7

BLANK OPEN REEL SHIPMENTS BY TYPE

	1979 Units (000)	1978 Units (000)	% Change 1979/1978
*Premium Ferrite	7,700	9,000	-14
Promotional Ferrite	1,500	2,000	-25
TOTAL	9,200	11,000	-16

BLANK 8-TRACK SHIPMENTS BY TYPE

	1979 Units (000)	1978 Units (000)	% Change 1979/1978
*Premium Ferrite	8,650	13,000	-33
Promotional Ferrite	12,950	19,000	-32
TOTAL	21,600	32,000	-33

*Includes High Coercivity Ferrite, Cobalt Ferrite, etc.

MICROCASSETTE RECORDER SHIPMENTS

1979		1978	
Units (000)	Retail Value (000)	Units (000)	Retail Value (000)
158	18,960	115	9,200

CASSETTE/RADIO COMBO SHIPMENTS

1979	
Units (000)	Retail Value (000)
3,967	277,690

CASSETTE TAPE DECKS WITH METAL PARTICLE TAPE CAPABILITY

1979	
Units (000)	Retail Value (000)
64	24,000

ELECTRONICS HIGHLIGHTS

VIDEO

B&W TV SHIPMENTS BY SCREEN SIZE

Screen-Size	1979 Units (000)	1978 Units (000)	% Change 1979/1978
Mini Combination Units	322	300	+ 7
9-Inch & Under (Excluding mini-combination units)	560	616	- 9
12-Inch	4,372	3,876	+13
13 & 15-Inch	176	180	- 2
16 & 17-Inch	156	224	-30
18 & 19-Inch	667	824	-19
22-Inch	28	44	-36
Console & Combo	23	34	-32
Table	5	10	-50
TOTAL	6,281	6,064	+ 4

COLOR TV SHIPMENTS BY SCREEN SIZE

Screen Size	1979 Units (000)	1978 Units (000)	% Change 1979/78
9-Inch	369	369	–
12 & 13-Inch	1,352	1,223	+11
14 & 15-Inch	316	339	- 7
16 & 17-Inch	382	470	-19
18 & 19-Inch	4,807	4,839	- 1
21-Inch	176	217	-19
23-Inch	248	300	-17
Console & Combo	212	255	-17
Table	36	45	-20
25-Inch	2,143	2,479	-14
Console & Combo	2,051	2,363	-13
Table	92	116	-21
TOTAL	9,793	10,236	- 4

PRE-RECORDED VIDEOTAPE BY FORMAT

Format		1979 Units (000)	Retail Value (000)
Beta		906	62,514
VHS		1,252	91,396
TOTAL		2,158	153,910

VIDEOCASSETTE RECORDER SHIPMENTS BY FORMAT

	1979		1978	
	Units (000)	Retail Value (000)	Units (000)	Retail Value (000)
Beta	148	132,312	125	116,875
VHS	330	298,980	277	239,605
TOTAL	478	431,292	402	356,480

VIDEO CAMERA SHIPMENTS BY TYPE

	1979		1978	
	Units (000)	Retail Value (000)	Units (000)	Retail Value (000)
B&W	30	10,620	46	14,398
Color	43	51,428	15	16,500
TOTAL	73	62,048	61	30,898

BLANK VIDEOTAPE SHIPMENTS BY FORMAT

	1979		1978	
	Units (000)	Retail Value (000)	Units (000)	Retail Value (000)
Beta	4,567	73,072	3,000	45,000
VHS	5,400	102,600	2,500	50,000
TOTAL	9,967	175,672	5,500	95,000

PRE-RECORDED VIDEOTAPE

Type	1979 Units (000)	1978 Units (000)	% Change 1979/1978
Non-X-Rated	633	390	+62
X-rated	1,525	810	+88
TOTAL	2,158	1,200	+80

TV GAME SHIPMENTS BY TYPE

Type	1979 (000)		1978 (000)		% Change 1979/1978
	Units	Retail Value	Units	Retail Value	
Non-Programmable	1,085	24,955	1,800	41,400	-40
Programmable	600	81,000	785	121,675	-24
TOTAL	1,685	105,955	2,585	163,075	-35

RADIO

HOME RADIO SHIPMENTS BY POWER SOURCE

Type	1979 Units (000)	1978 Units (000)	% Change 1979/1978
Plug-In	11,700	12,082	- 3
Battery-Operated	8,400	8,412	N.C.
AC/DC Combo	8,450	11,984	-29
TOTAL	28,850	32,478	-11

HOME RADIO SHIPMENTS BY TYPE

Type	1979 Units (000)	1978 Units (000)	% Change 1979/1978
AM only	5,710	7,933	-28
FM & AM/FM	22,840	24,545	- 7
TOTAL	28,550	32,478	-12

SPECIALTY RADIO SHIPMENTS BY TYPE

Type	1979 Units (000)	1978 Units (000)	% Change 1979/1978
MULTI-BAND	7,200	7,000	+ 3
WEATHER-BAND	950	1,000*	- 5
SCANNERS	920	800*	+15
DIGITAL CLOCK	7,600	7,361	+ 3
Solid State	4,700	3,090	+52
Mechanical Leaf	2,900	4,271	-32

*Revised

PERSONAL ELECTRONICS HIGHLIGHTS

Analysis:

If there were a contest in personal electronics products growth in 1979, it wouldn't be a contest. Non-video electronic games experienced the most growth in this category—at least in unit sales.

Hand-held models did particularly well at retail with 12.9 million units sold during the year—a 251% increase over 1978.

To be sure, there were many more suppliers in 1979, and they had quite a few more games to offer, especially toward the end of the year when they experience most of their sales. But there were still some shortages at retail and several suppliers and merchants have indicated they could have sold even more games had they been in more plentiful supply.

One big plus was that electronics have begun to move into a broader market. For example, there are more electronic games designed for the preschooler than ever before.

Another point for the retailer is that his early fears that consumers wouldn't accept the higher priced games have been allayed.

Board games growing

Although most of the action continues in the hand-held variety, electronic board games sales also are growing. Sales of these units were up 61%, to the point where they now make up almost a third of the non-video electronic games market in unit sales.

Overall, 16,083,000 games were sold in 1979, a 184% jump over the 5,656,000 sold in 1978.

Personal computers also demonstrated good sales growth in '79, but, again, probably didn't do as well as many marketers had projected.

But the market is obviously catching on as unit sales climbed to 246,000 versus 212,000 in '78.

Although radar detector makers had anticipated a better than one-million unit sales year, it apparently hasn't worked out that way. From expectations earlier this year of about 1.4 million units, radar detector sales are now estimated to have come closer to 610,000 in 1979, or down about 28% from the 850,000 sold in '78.

Advanced phones do best

Telephones continued to grow last year, with decorator models gaining on the so-called standard style. But the advanced electronic unit, those multi-featured models with digital displays, produced the greatest gains during the year.

In fact, the "advanced" models jumped to 144,000 shipments against 66,000 the previous year, at least partly due to greater consumer awareness of the category and, of course, new products.

Decorator phones are up at least a third in '79 shipments and the standard telephones climbed to 994,000 in unit shipments compared to 752,000 in '78.

LCD outstrips LED watches

In digital watches, LCD models continued to gain against LED units. This was particularly true in women's models—indeed, shipments of LED women's styles fell by about 62% during the year. Overall, LED display watches were off 53% in '79.

LCD watch shipments were up across the board over 1978—up 34% for men's models and up 82% for women's. One reason for the improved shipments of women's models, some industry sources believe, is that they're now available in so many more styles and designs. Also, the range of prices is greater.

Overall, an estimated 19,717,000 digital watches were shipped in the U.S., an 11% increase over the 17,750,000 shipped in 1978.

CB radio isn't foundering by any means, but it is a declining market.

This is particularly true of base station models, which dropped 72% in shipments last year.

Mobile CBs didn't much better.

Overall, an estimated 1,590,000 CB radios were shipped in the U.S. during 1979, down 66% from the 4,736,000 moved the previous year. ●

CITIZEN BAND RADIO SHIPMENTS BY TYPE

	1979 Units (000)	1978 Units (000)	% Change 1979/1978
BASE STATION Without SINGLE SIDEBAND	115	491	-77
BASE STATION With SINGLE SIDEBAND	75	195	-62
TOTAL BASE STATION	190	686	-72
MOBIL UNITS Without SINGLE SIDEBAND	1,175	3,612	-67
MOBIL UNITS With SINGLE SIDEBAND	225	438	-49
TOTAL MOBILE UNITS	1,400	4,050	-65
TOTAL CB'S	1,590	4,736	-66

NON-VIDEO ELECTRONIC GAME SHIPMENTS

	1979 Units (000)	1978 Units (000)	% Change 1979/1978
Board	3,183	1,976	+ 61
Hand-Held	12,900	3,680	+251
TOTAL	16,083	5,656	+184

PERSONAL COMPUTER SHIPMENTS

1979 Units (000)	1978 Units (000)	% Change 1979/1978
246	212	+16

RADAR DETECTOR SHIPMENTS

1979 Units (000)	1978 Units (000)	% Change 1979/1978
610	850	-28

DIGITAL WATCH SHIPMENTS BY TYPE

	1979 Units (000)	1978 Units (000)	% Change 1979/1978
LED			
Men's	2,367	4,675	-49
Women's	600	1,575	-62
TOTAL	2,967	6,250	-53
LCD			
Men's	11,750	8,750	+34
Women's	5,000	2,750	+82
TOTAL	16,750	11,500	+46
GRAND TOTAL DIGITAL WATCHES	19,717	17,750	+11

TELEPHONE SHIPMENTS

	1979		1978	
	Units (000)	Retail Value (000)	Units (000)	Retail Value (000)
Standard	994	28,826	752	18,800
Decorator	962	81,770	600	43,800
Advanced Electronic	144	21,600	66	4,620
TOTAL	2,100	132,196	1,418	67,220

WORLD MARKETING

The Export/Import Picture for Major Appliances, Home Electronics, and Housewares

EXPORTS

Number of units exported. Mfr's value plus freight and insurance (all figures in thousands)

MAJOR APPLIANCES

PRODUCT	1979*	1978	1977	1976
DISH-WASHERS	170 $30,809	171 $31,537	198 $ 34,439	241 $ 42,289
DRYERS	48 $10,395	55 $10,108	71 $ 11,801	76 $ 11,405
FREEZERS	47 $15,949	49 $14,310	40 $ 10,660	36 $ 10,100
MICROWAVE OVENS	99 $26,290	133 $28,532	72 $ 15,386	77 $ 17,173
RANGES, ELECTRIC	73 $19,511	130 $23,024	70 $ 11,942	63 $ 10,944
REFRIG-ERATORS	342 $140,324	370 $137,351	318 $ 98,980	267 $ 85,500
ROOM AIR CONDITIONERS	633 $195,495	873 $251,159	884 $254,439	759 $188,064
WASHERS, AUTOMATIC	85 $23,238	87 $19,427	127 $ 27,384	122 $ 24,896
WASHERS, OTHER	121 $26,213	156 $29,344	49 $ 8,438	62 $ 10,044

HOME ELECTRONICS

PRODUCT	1979*	1978	1977	1976
RADIOS	1,168 $64,415	1,523 $73,672	1,138 $ 53,027	1,269 $ 44,936
TV, B&W	158 $17,431	212 $21,374	153 $ 16,268	156 $ 19,986
TV, COLOR	360 $129,801	407 $129,856	186 $ 65,111	14 $ 160
TV CHASSIS & KITS	2,161 $110,973	2,511 $112,461	1,908 $ 96,833	3,061 $139,823
TV, TOTAL	2,679 $258,205	3,131 $263,691	2,248 $178,212	3,376 $220,905
TAPE RECORDERS & PLAYERS	173 $17,310	81 $13,095	198 $ 41,391	171 $ 33,153
VIDEOTAPE RECORDERS	3 $58,974	10 $41,860	8 $ 46,140	15 $ 51,513

HOUSEWARES

PRODUCT	1979*	1978	1977	1976
CAN OPENERS & KNIFE SHARPENERS	192 $ 1,941	170 $ 1,502	136 $ 1,224	196 $ 1,184
CLOCKS, ELECTRIC	955 $10,834	1,122 $10,564	912 $ 8,106	1,029 $ 9,398
COFFEE-MAKERS	1,079 $13,888	844 $10,110	627 $ 7,285	985 $11,832
FANS	309 $ 8,053	205 $ 5,625	515 $ 8,887	562 $ 8,826
IRONS	1,436 $13,990	1,259 $11,031	1,469 $18,802	1,251 $10,352
JUICERS, MIXERS & BLENDERS	1,365 $32,300	1,837 $38,383	1,356 $27,966	1,168 $20,639
PORTABLE ELECTRIC DRILLS	681 $14,131	691 $13,032	654 $10,948	596 $10,622
PORTABLE ELECTRIC SAWS**	671 $14,645	948 $14,984	– –	– –
PORT. ELEC. HANDTOOLS OTHER	2,058 $57,693	2,517 $63,978	3,487 $68,716	3,002 $60,847
SHAVERS, ELECTRIC	292 $ 3,199	152 $ 1,614	316 $ 2,846	152 $ 2,194
TOASTERS	1,388 $14,729	1,116 $10,327	726 $10,656	733 $ 6,979
VACUUM CLEANERS	840 $49,944	751 $37,822	745 $34,635	676 $28,468

SOURCE: U.S. Customs *Projection based on 11 months **Included in Portable Electric Handtools 1975-1977.

WORLDWIDE MARKETING (continued)

Number of units imported. Dollars paid by importers excluding duty, etc. (All figures in thousands)

IMPORTS: HOME ELECTRONICS

VIDEO

PRODUCT	1979	1978	1977	1976
ANTENNAS, TV	11,882 $ 12,477	11,676 $ 10,650	8,775 $ 8,053	3,179 $ 6,550
B&W TV (10-inch & under)	763 $ 54,200	1,077 $73,936	807 $ 49,997	871 $ 53,877
B&W TV (11-17 inches)	4,558 $243,487	4,300 $232,643	3,575 $202,933	3,127 $176,025
B&W TV (Over 18 inches)	502 $ 42,720	554 $ 44,279	526 $ 40,889	329 $ 24,834
COLOR TV (10-inch & under)	130 $ 28,023	240 $ 44,589	209 $ 34,186	135 $ 22,049
COLOR TV (11-17 inches)	714 $146,196	1,188 $221,914	940 $170,256	1,115 $188,513
COLOR TV (Over 18 inches)	577 $138,762	1,347 $310,585	1,391 $296,676	1,583 $310,953
TV, TOTAL	7,245 $653,388	8,706 $927,946	7,446 $794,937	7,161 $776,252
VIDEO TAPE RECORDERS	616 $342,421	509 $279,629	250 $ 73,666	70 $ 50,413
HOME VIDEO CAMERA, B&W	68 $ 14,947	108 $ 20,472	64 $ 12,172	– –
HOME VIDEO CAMERA, COLOR	107 $ 80,057	58 $ 54,261	11 $ 27,578	– –
PICTURE TUBES, B&W	641 $ 9,693	750 $ 8,272	515 $ 4,725	268 $ 2,184
PICTURE TUBES, COLOR	328 $ 20,858	297 $ 16,590	290 $ 15,498	191 $ 12,369

CALCULATORS

PRODUCT	1979	1978	1977	1976
DISPLAY ONLY	1,144 $ 19,632	1,281 $ 20,840	771 $ 13,447	– –
FULL KEYBOARD	– –	– –	41 $ 1,920	– –
HAND-HELD OR POCKET TYPE	18,812 $149,446	15,936 $132,925	9,186 $ 59,761	– –
10-KEY KEYBOARD NON-PRINT	– –	– –	119 $ 1,882	– –
10-KEY KEYBOARD PRINTING	– –	– –	553 $ 27,731	– –
OTHER FOR X AND ÷	509 $ 6,536	571 $ 14,598	593 $ 16,609	– –
ALL OTHER	3,853 $152,409	5,198 $177,199	5,599 $117,935	– –
TOTAL	24,319 $328,023	22,985 $345,562	16,861 $239,285	– –

AUDIO

PRODUCT	1979	1978	1977	1976
ANTENNAS, CB	1,713 $ 5,197	2,704 $ 7,781	– –	– –
ANTENNAS, RADIO	7,705 $ 14,269	5,198 $ 9,456	11,604 $ 34,105	14,356 $ 43,666
LOUDSPEAKERS	90,712 $251,369	90,253 $248,198	77,368 $173,852	74,278 $131,797
MICROPHONES	9,551 $ 26,478	8,732 $ 24,678	9,797 $ 24,388	9,166 $ 22,605
AUDIO FREQUENCY ELECTRIC AMPLIFIERS	4,757 $121,148	4,834 $107,504	3,696 $ 63,369	2,896 $ 37,513
HEADPHONE/ELECTRIC SOUND AMPLIFIER SETS	4,761 $ 33,026	5,586 $ 28,739	5,638 $ 21,525	5,190 $ 18,799
AUTO TRANSISTOR RADIOS	2,593 $ 95,644	3,335 $121,396	5,048 $152,204	5,474 $129,217
CLOCK TRANSISTOR RADIOS	8,678 $ 89,040	11,660 $120,274	9,274 $119,576	7,499 $ 86,293
AM TRANS. RADIOS (Not Battery Operated)	766 $ 44,137	1,118 $ 36,416	972 $ 13,156	1,154 $ 12,934
AM TRANS. RADIOS (Battery Operated)	6,633 $ 23,953	8,719 $ 25,377	9,347 $ 30,122	9,586 $ 27,970
FM AM/FM MULTIBAND TRANSISTOR RADIOS (Not Battery Operated)	2,469 $189,848	2,989 $247,384	3,010 $206,042	2,686 $168,873
FM AM/FM MULTIBAND TRANSISTOR RADIOS (Battery Operated)	9,984 $142,816	13,449 $19[illegible],299	13,870 $219,156	14,341 $198,796
RADIOS, TOTAL	31,123 $585,439	41,270 $749,145	41,521 $740,256	40,740 $624,083
RADIO/PHONO COMBOS (Including Consoles)	220 $ 5,900	361 $ 8,328	492 $ 11,186	404 $ 11,916
RADIO/PHONO/TAPE PLAYER COMBOS (Tape Player Trimode)	269 $ 9,549	449 $ 17,015	466 $ 18,337	483 $ 16,171
AUTOMATIC RECORD CHANGER	5,246 $ 92,297	8,644 $143,344	7,117 $106,735	6,604 $ 96,835
STEREO PHONOS	69 $ 5,186	135 $ 8,170	89 $ 5,875	89 $ 5,586
AUTOMATIC TURNTABLES	299 $ 23,198	480 $ 28,513	330 $ 17,801	239 $ 12,507
TURNTABLES OTHER	1,474 $ 89,959	1,933 $101,293	1,887 $ 62,864	1,276 $ 38,606
TRANSCEIVERS,/CB	1,248 $ 53,318	2,087 $ 92,408	5,461 $316,290	– –
TAPE PLAYERS AUTO	2,335 $ 55,982	2,884 $ 70,926	2,553 $ 52,523	4,143 $ 64,433
TAPE PLAYERS OTHER	1,135 $ 19,103	946 $ 17,595	1,100 $ 20,547	1,366 $ 25,658
TAPE RECORDERS, STEREO (Cassette/Cartridge)	2,153 $186,099	2,226 $179,172	1,348 $102,895	1,104 $ 71,748
TAPE RECORDERS, STEREO (Open Reel)	163 $ 18,689	165 $ 20,603	54 $ 11,536	92 $ 17,930
TAPE RECORDERS, MONO (Cassette/Cartridge)	830 $ 31,381	1,016 $ 41,919	1,825 $ 63,732	2,305 $ 60,046
TAPE RECORDERS, MONO (Open Reel)	57 $ 5,603	81 $ 10,238	84 $ 8,255	53 $ 3,420
TAPE RECORDERS, BATTERY (Cassette/Cartridge)	5,860 $157,210	6,946 $172,114	5,875 $127,968	5,247 $126,426
TAPE RECORDERS, BATTERY (Open Reel)	261 $ 23,604	333 $ 27,487	275 $ 22,778	348 $ 18,336
RADIO-TAPE RECORDER COMBOS	6,982 $354,703	5,230 $254,990	4,011 $265,942	3,514 $139,311
RADIO-TAPE PLAYER COMBOS	10,370 $505,514	9,982 $466,910	8,795 $349,941	7,774 $295,147
TOTAL TAPE RECORDERS/PLAYERS	30,147 $1,357,889	29,808 $1,261,953	25,001 $1,008,142	25,947 $822,456

WORLD MARKETING: IMPORTS (continued)

MAJOR APPLIANCES

PRODUCT	1979	1978	1977	1976
FREEZERS	42 $ 6,759	36 $ 5,883	33 $ 3,991	41 $ 4,218
MICROWAVE OVENS	826 $160,032	781 $162,540	563 $102,970	530 $81,531
REFRIGERATOR/ FREEZER COMBINATION (UNDER 6.5 CU.FT.)	410 $30,876	512 $41,788	275 $22,908	262 $19,256
REFRIGERATOR/ FREEZER COMBINATION (6.5 TO 9.5 CU.FT.)	30 $ 3,083	18 $ 1,945	24 $ 2,195	20 $ 2,114
REFRIGERATOR/ FREEZER COMBINATION (9.5 TO 13.5 CU.FT.)	45 $ 6,195	62 $ 7,484	56 $ 5,584	48 $ 5,013
REFRIGERATOR/ FREEZER COMBINATION (13.5 CU.FT. & OVER)	3 $ 1,395	7 $ 1,547	13 $ 2,679	9 $ 1,542
TOTAL REFRIGERATOR/FREEZER COMBINATION	488 $41,549	600 $52,764	368 $33,366	339 $27,925

HOUSEWARES

PRODUCT	1979	1978	1977	1976
CAN OPENERS & COMBINATIONS	471 $ 2,692	1,744 $ 7,596	1,733 $ 7,022	1,460 $ 5,733
COFFEE MAKERS	512 $ 5,362	633 $ 4,477	75 $ 440	608 $ 4,069
FOOD BLENDERS	516 $ 8,564	776 $12,894	538 $11,814	121 $ 1,272
HAIR DRYERS	15,738 $91,452	18,357 $115,800	15,957 $104,563	11,684 $75,040
IRONS	722 $ 8,406	234 $ 772	62 $ 307	35 $ 133
JUICE EXTRACTORS	217 $ 3,363	406 $ 5,205	338 $ 3,903	228 $ 2,465
SHAVERS, ELECTRIC	3,696 $57,261	3,728 $52,084	3,643 $48,620	3,077 $38,451
TOASTERS	152 $ 1,628	4 $ 49	50 $ 400	49 $ 297
VACUUM CLEANERS	340 $ 6,017	340 $ 5,520	348 $ 5,473	316 $ 4,547

(Final three 000s omitted)

Analysis:

The brightest import/export picture shows up for the electric housewares included in *Merchandising*'s World Marketing data. data.

Based on figures from U.S. Customs for nine electric housewares, imports were considerably below 1978 levels for can openers, coffeemakers, blenders, hair dryers and juice extractors. Also below the previous year's total but by less than 40,000 units are electric shavers.

More on-shore output

This could indicate a changeover to more on-shore production of these electric housewares and an attempt to correct the U.S. trade "imbalance."

For example, total can opener unit sales for 1979 are set at 5.5 million vs. 5.7 million in 1978, a drop of roughly 200,000 units. (See 10-year tables.) The number of can openers imported in 1979 totaled 471,000 units compared with 1.7 million units in 1978 or a drop of more than 1.2 million units.

While coffeemakers were off in unit imports, they were ahead in dollars. Much of this is due not to the dollar's weakness in the world money market but to imports of high-end espresso/cappuccino machines which are gaining popularity in the U.S. marketplace.

Showing no change in units imported, vacuum cleaners did ring up a higher dollar amount compatible with fluctuating currencies.

At first look, there is a dramatic increase of iron and toaster imports. A spot check, however, revealed that the bulk of these are "national brand" products produced off-shore but entering the country ready for the retailer's shelf.

Rise in housewares exports

Exports of seven of 12 electric housewares included in the World Marketing data show increases from a low of about 20,000 units for can openers and knife sharpeners to more than 270,000 units for toasters.

Dollar values are up on all the above items and for exports of electric clocks and portable electric drills, both of which show a drop in total units exported in 1979.

Refrigeration, m/w imports up

Imports of freezers, microwave ovens and refrigerator/freezer combos rose in 1978. Microwave ovens crossed the 800,000 unit mark for a total of $160 million. A change in price points is suggested here since, while just over 780,000 units were imported in 1978, the dollar value equalled $162.5 million.

Imports of refrigerator/freezer combos almost doubled in both units and dollars, reflecting the growing popularity of compact units.

Exports of major appliances were down across the board in units. Freezers and automatic washers reflected a dollar increase, however.

Most video imports fall

With the exception of 11- to 17-in. b/w tv sets, videotape recorders and color picture tubes, unit imports of video products fell below 1978.

Along with the above three items, home video cameras and b/w pictures tubes recorded dollar increases. Radio and tv antennas jumped ahead of 1978 in both unit and dollar volume.

About 1.4 million more calculators, primarily hand-held units, were imported in 1979 as compared to 1978, the dollar volume dropped almost $20 million reflecting the lower prices on these items.

Audio imports/exports

In the audio classification, loudspeakers, other tape players, radio-tape recorders, radio-tape players and microphones posted import gains over 1978 in units and dollars.

Three other products—audio frequency electric amplifiers, headphone electric sound amplifier sets and AM transistor radios—had dollar gains only.

Exports of home electronics products, not unexpectedly, were below 1978 unit shipments with the exception of commercial tape recorders and players. These items posted dollar gains as did videotape recorders.

Imports of CB transceivers off

Imports of CB transceivers continued their downward slide. Forty-channel home base units took a nosedive from 215,000 units at $13.4 million in 1978 to about 78,000 units at $4.2 million in 1979. Home base units with single sideband were down about 1,000 and $300,000.

Both the 40-channel and single sideband motor vehicle transceivers posted declines in units and dollars for imports, as well.

While the decline in imports and exports of most home electronic products is a step toward correcting U.S. balance of trade, more importantly, it underlines the foreign manufacturers who are producing on-shore and the relative status in the business last year. •

SATURATION ANALYSIS:

The potential merchandising opportunities in white and brown goods and electric housewares are diverse and many, as may be seen in the 1979 Saturation Index and 10-Year Saturday levels charts in the following two pages.

They can take two forms: Promoting in product areas where the numbers are low, especially for those items which are relatively new to the market; and pushing the replacement theme where the numbers are high.

In other words, microwave ovens, with a 7.6% saturation level, and color television, with its 89.8% saturation, both offer great merchandising openings, although it is a first-time purchaser who must be addressed in the first case, and a more-than-likely second-time purchaser in the second.

Six items show declines

Of the 42 products tracked in these tables, only six registered declines in 1979, and it seems likely that freezers, free-standing and built-in electric ranges had to be adversely affected by the fact that the number of electrified homes in the country rose by only 2%, compared with the 4.4% increase in 1978.

Freezers were off 0.2% to 44.7%, free-standing electric ranges were down 0.8% to 50%, and electric built-ins slipped 0.4% to 19.4%.

The other products which lost ground were electric fondues, down 0.1% to 4.5%; frypan-skillets, off 0.3% to 68%; and hotplates and buffet ranges, also off 0.3% to 26%. All other products either increased their saturation percentages or were unchanged.

Of the eight products registering no change in saturation from 1978 to 1979, five—irons, radios, monochrome television, toasters and vacuum cleaners—are as close to total saturation as is statistically possible. Calculators and coffeemakers increased their percentages to that point—99.9%—from 98.4% and 99.8%, respectively.

Four big gainers

Leading the gainers with three percentage points or more were digital watches, up 5% to 41.5%; color television, up 4.6% to 89.8%; hair dryers, up 3.9% to 44.1%; and food processors, up 3.1% to 6.9%.

The substantial gain in color tv penetration despite its previous high saturation level is, of course, another reflection of the importance of the second-set and replacement purchaser to this market in 1979, the second best sales year in its history. Food processors, on the other hand, almost doubled in market penetration from 1978 to 1979, but with a saturation percentage of only 6.9% should be able to continue a healthy rate of growth for some years to come.

Eight up point or more

Among the other products registering improvements of a point or more in their saturation percentages, five are in the housewares category and three are major appliances.

Housewares include can openers, ahead 2.9% to 63.6%; electric bed coverings, up 2.4% to 64.2%; ADC coffeemarkers, up 2.0% to 33.6%; cornpoppers, up 1.4% to 44.4%; and blenders, up 1.2% to 52.4%.

Major appliance gainers in this group are clothes washers, up 2.1% to 77.3%; clothes dryers, up 1.2% to 61.5%; and dishwashers, up 1.1% to 43.0%.

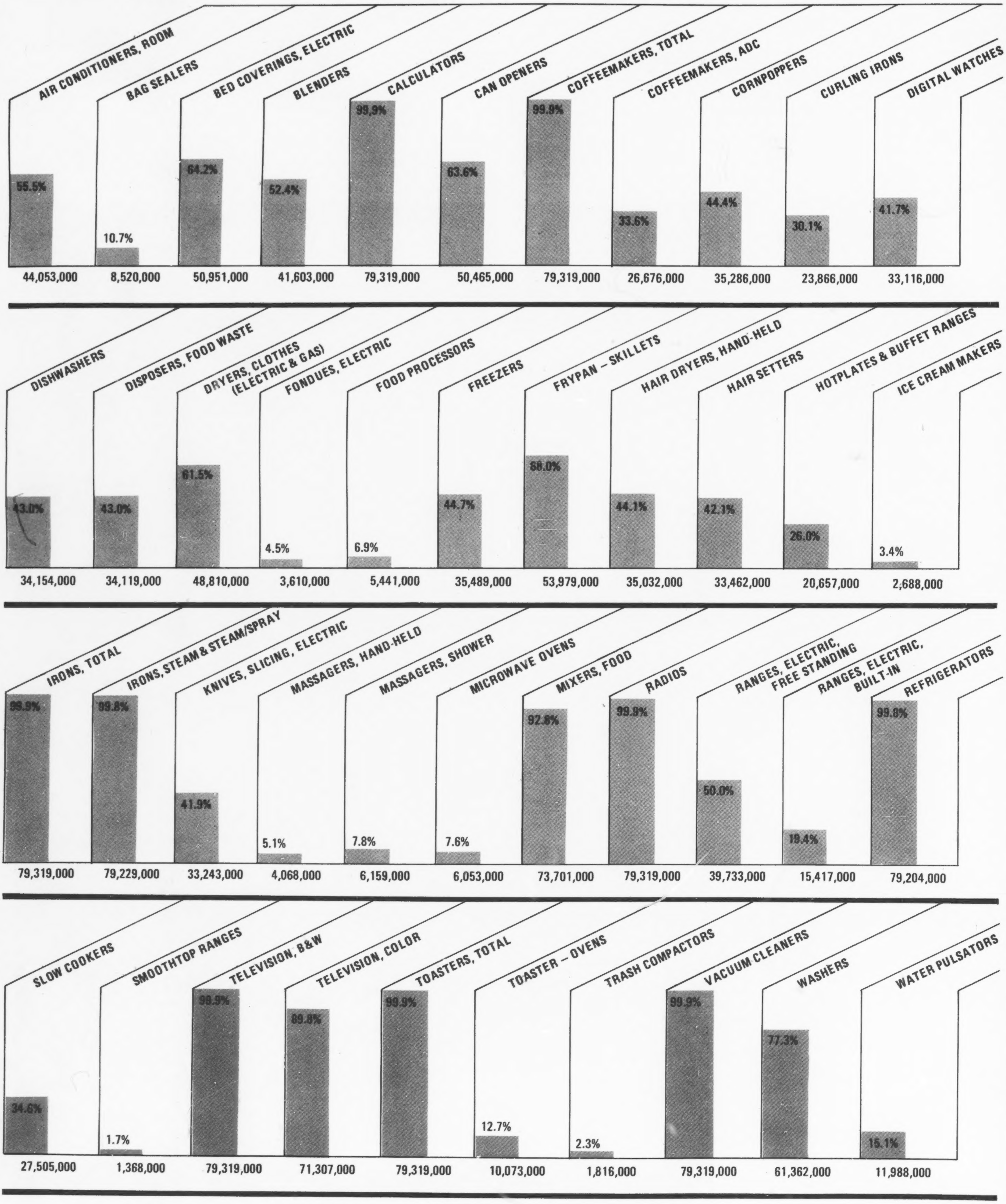
All other products on the tables were up less than one percentage point.

Two products which appeared in previous years—hamburger makers and styling combs—have been eliminated from this year's saturation tables, and oral hygene devices have been labeled "water pulsators" on the current charts.

Saturation is based on the percentage of electrified homes possessing one or more of each of the listed products. The first chart (p. 60) shows both saturation percentages and the actual number of electrified homes with a particular product, while the second chart (p. 61) demonstrates the saturation trends—product by product—over the past 10 years. ●

SATURATION LEVELS: 1979

Percentages and Totals of Wired Homes With These Products



ALL FIGURES BASED ON 79,398,569 TOTAL ELECTRIFIED HOMES

SATURATION LEVELS: 1970-1979

PRODUCTS	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
AIR CONDITIONERS, ROOM	40.6%	44.5%	46.7%	48.9%	51.6%	52.8%	54.4%	55.3%	55.4%	55.5%
BAG SEALERS	–	–	–	–	–	–	4.2	10.6	10.6	10.7
BED COVERINGS, ELECTRIC	49.5	51.1	52.7	53.9	55.7	57.0	58.6	59.9	61.8	64.2
BLENDERS	36.5	40.0	41.5	42.9	43.8	45.2	47.6	50.0	51.2	52.4
CALCULATORS	–	–	8.9	26.2	46.7	67.6	83.0	92.7	98.4	99.9
CAN OPENERS	45.5	48.1	49.5	50.7	52.3	54.6	56.4	57.9	60.7	63.6
COFFEEMAKERS, TOTAL	86.6	91.0	93.1	94.8	96.5	97.7	99.4	99.7	99.8	99.9
COFFEEMAKERS, ADC	–	–	–	1.6	5.4	12.1	23.4	30.0	31.6	33.6
CORNPOPPERS	26.7	29.1	32.1	36.3	37.8	39.3	40.7	42.4	43.0	44.4
CURLING IRONS	–	–	–	2.9	8.5	12.6	21.9	27.3	28.6	30.1
DIGITAL WATCHES	–	–	–	0.5	1.3	5.1	16.9	32.3	36.7	41.7
DISHWASHERS	26.5	29.6	32.0	34.3	36.6	38.3	39.6	40.9	41.9	43.0
DISPOSERS, FOOD WASTE	25.5	28.4	31.9	35.3	37.2	38.8	40.7	42.8	42.9	43.0
DRYERS, CLOTHES (ELECTRIC & GAS)	44.6	47.6	51.0	53.9	56.5	57.7	58.6	59.3	60.3	61.5
FONDUES, ELECTRIC	–	1.1	2.1	2.9	3.7	4.2	4.5	4.6	4.6	4.5
FOOD PROCESSORS	–	–	–	–	–	–	0.3	1.2	3.8	6.9
FREEZERS	31.2	32.7	34.3	37.9	41.7	43.5	44.4	44.8	44.9	44.7
FRYPAN – SKILLETS	56.2	58.0	59.4	60.6	61.6	63.0	63.6	64.4	68.3	68.0
HAIR DRYERS, HAND-HELD, STYLING	–	1.8	4.5	9.1	15.7	20.9	28.0	33.3	40.2	44.1
HAIR SETTERS	23.3	28.5	32.8	36.5	38.5	40.0	41.3	41.8	41.8	42.1
HOTPLATES & BUFFET RANGES	24.5	24.8	25.0	25.1	25.5	26.2	26.6	26.7	26.3	26.0
ICE CREAM MAKERS	–	–	–	–	–	–	1.5	2.8	3.1	3.4
IRONS, TOTAL	99.7	99.8	99.9	99.9	99.9	99.9	99.9	99.9	99.9	99.9
IRONS, STEAM & STEAM/SPRAY	88.2	90.1	91.4	93.3	95.0	97.2	97.7	98.6	99.0	99.8
KNIVES, ELECTRIC, SLICING	36.2	37.2	38.1	39.4	40.5	41.1	41.6	41.8	41.7	41.9
MASSAGERS, HAND-HELD	–	–	–	1.3	2.4	3.3	4.3	5.0	5.1	5.1
MASSAGERS, SHOWER	–	–	–	–	1.1	2.8	5.4	7.1	7.4	7.8
MICROWAVE OVENS	–	0.2	0.6	1.2	2.2	3.2	5.1	6.7	7.1	7.6
MIXERS, FOOD	82.4	84.4	85.2	87.3	88.5	90.2	91.1	92.4	92.2	92.8
RADIOS	99.8	99.8	99.9	99.9	99.9	99.9	99.9	99.9	99.9	99.9
RANGES, ELECTRIC, FREE-STANDING	40.5	42.6	44.1	46.4	48.8	49.2	50.4	51.8	50.8	50.0
RANGES, ELECTRIC, BUILT-IN	15.0	15.7	16.6	17.3	18.8	19.3	19.7	20.1	19.8	19.4
REFRIGERATORS	99.8	99.8	99.9	99.9	99.9	99.9	99.9	99.9	99.7	99.8
SLOW COOKERS	–	–	–	4.6	8.0	16.7	25.5	33.8	34.2	34.6
SMOOTH-TOP RANGES	–	–	–	0.3	0.7	1.1	1.4	1.7	1.7	1.7
TELEVISION, B & W	98.7	99.8	99.8	99.9	99.9	99.9	99.9	99.9	99.9	99.9
TELEVISION, COLOR	42.5	51.1	60.7	67.1	71.5	74.4	77.7	81.3	85.2	89.8
TOASTERS, TOTAL	92.6	94.2	95.1	96.5	97.8	98.6	99.4	99.9	99.9	99.9
TOASTERS – OVENS	–	–	1.2	3.1	5.1	7.0	9.4	11.0	11.8	12.7
TRASH CAMPACTORS	–	0.2	0.5	0.9	1.4	1.7	2.0	2.3	2.3	2.3
VACUUM CLEANERS	92.0	94.4	96.9	97.5	98.4	99.2	99.5	99.9	99.9	99.9
WASHERS	62.1	64.3	66.9	67.8	68.4	69.9	72.5	73.3	75.2	77.3
WATER PULSATORS	8.1	9.3	10.6	11.9	12.9	13.7	14.4	14.8	14.9	15.1
(BASE) TOTAL NUMBER WIRED HOMES	64,025,000	65,550,000	67,307,000	69,448,000	70,908,000	72,717,000	74,084,000	75,889,000	77,830,000	79,336,560

RETAIL SALES PATTERNS

Percentage of Annual Retail Sales, by Region / Month

The data on this and the next two pages were projected from a national sampling of retailers.

The East

Except for air conditioners, freezers and refrigerators which hit their sales peaks in summer and washers which peaked in October, December sales of television sets and the other major appliances were the tops for 1979 in the East.

Television: Both color and b/w television almost doubled November sales in December, and the former had been their best showing to date.

Dishwashers: While December was definitely the peak month for dishwashers, with retailers recording 20.8% of annual sales, November posted a healthy 10%, followed by August with 9.6%.

Dryers: December went ahead of October for top dryer-sales month by 0.3%. The slow months—those posting less than 5% in sales—were April, May and July.

Freezers: Heralding the early harvests, August posted highest gains for freezer sales—17.5%.

Microwave ovens: Through October, sales of microwave ovens were flat at best. In November they jumped to 16.1% and soared to 44.4% in December.

Refrigerators: August recorded the high for refrigerator sales—14.9%; July was second at 11.3%.

Washers: While washer sales peaked at 12% in October—June, August and December were also double-digit months.

PRODUCT		THE EAST Comprising the states of Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island & Vermont.											
		JAN.	FEB.	MAR.	APR.	MAY	JUNE	JULY	AUG.	SEPT.	OCT.	NOV.	DEC.
B&W TELEVISION	1979	7.1	6.9	5.2	4.4	6.5	5.4	5.4	9.5	9.1	8.9	10.6	21.0
	1978	4.7	5.8	7.5	6.8	5.9	6.5	7.9	5.4	7.7	8.5	9.6	23.7
COLOR TELEVISION	1979	6.3	6.1	6.7	5.6	5.4	6.1	5.6	8.4	10.1	8.6	11.1	20.0
	1978	6.7	5.5	5.1	5.1	5.6	4.5	6.3	6.1	10.7	13.0	13.1	18.3
TOTAL TELEVISION	1979	6.7	6.5	6.0	5.0	6.0	5.7	5.5	9.0	9.6	8.7	10.8	20.5
	1978	5.7	5.6	6.3	6.0	5.8	5.5	7.1	5.8	9.2	10.8	11.3	20.9
AIR CONDITIONERS (ROOM)	1979	0.3	0.4	0.8	1.5	8.4	20.4	39.1	26.4	1.9	0.5	0.1	0.2
	1978	1.2	0.4	0.8	2.3	15.7	29.0	29.2	18.6	2.4	0.4	0.4	0.3
DISHWASHERS	1979	4.5	3.9	6.5	6.4	6.5	8.2	7.0	9.6	8.5	8.1	10.0	20.8
	1978	4.2	2.9	5.8	10.5	9.9	8.9	4.4	7.6	6.5	8.0	10.8	20.5
DRYERS	1979	7.1	6.6	8.7	4.4	4.9	9.2	4.6	9.4	10.0	12.7	9.4	13.0
	1978	8.9	6.9	7.7	9.9	6.2	4.3	5.1	5.2	10.7	14.4	8.5	12.2
FREEZERS	1979	4.2	5.0	3.6	8.5	4.2	6.0	13.0	17.5	11.3	10.0	9.9	6.8
	1978	3.8	3.4	3.5	7.3	8.2	10.8	12.6	17.7	9.2	10.5	5.2	7.8
MICROWAVE OVENS	1979	4.9	2.8	2.9	2.7	4.6	3.3	3.5	4.9	4.6	5.3	16.1	44.4
	1978	2.9	2.5	1.6	6.0	5.2	4.0	5.0	2.3	3.6	10.6	12.9	43.4
RANGES	1979	5.8	5.6	5.2	8.9	6.8	5.9	6.1	11.9	8.9	9.5	10.9	14.5
	1978	3.6	6.6	9.5	10.2	8.7	8.6	9.7	6.5	9.7	7.6	9.1	10.2
REFRIGERATORS	1979	4.6	4.2	5.0	7.7	9.2	10.6	11.3	14.9	7.7	6.6	8.1	10.1
	1978	2.8	4.2	5.5	9.4	9.7	13.2	16.9	12.6	8.7	8.2	4.6	4.2
WASHERS	1979	6.0	6.6	9.1	5.4	6.5	10.2	6.1	10.5	8.2	12.0	8.2	11.2
	1978	8.1	7.4	8.4	9.7	7.6	6.3	6.6	6.8	10.3	11.6	7.8	9.4

The Midwest

With few exceptions, December scored sizeable retail gains in the Midwest. The summer months, obviously, were best for the "cool" products—air conditioners, freezers and refrigerators.

Television: December was the big month for television sales—26.8% of b/w sets were sold in the Midwest that month and 21.3% of color sets.

Air conditioners: Sales of air conditioners peaked in July with a 34.9% share of annual sales. A low of 0.1% was reported for December.

Dryers: October, September and November were the win, place and show months, respectively, for dryer sales.

Freezers: February to April were the low points for freezer sales. With 17% of annual sales posted, June was the big winner in the Midwest.

Microwave ovens: Excluding January and May, each with a better than 7% share of annual sales, microwave oven business was definitely a fourth-quarter event.

Ranges: Ranges, too, hit their sales stride in the final quarter of 1979. Sales were steady the remainder of the year from 5.8% to 7.5% with the exception of June when sales hit 10.6%.

Refrigerators: June and July tied as the best-selling months for refrigerators—each recording a 13.9% share of annual sales.

Washers: The year started out well for washers and a good pace was maintained. The peak month was September at 12.4% and the low February at 6%.

PRODUCT		THE MIDWEST Comprising the states of Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota & Wisconsin.											
		JAN.	FEB.	MAR.	APR.	MAY	JUNE	JULY	AUG.	SEPT.	OCT.	NOV.	DEC.
B&W TELEVISION	1979	8.2	6.2	6.6	4.9	5.3	6.7	3.7	5.1	7.1	8.4	11.0	26.8
	1978	10.5	5.6	5.6	5.1	4.0	6.1	5.0	6.7	8.0	9.4	12.1	22.9
COLOR TELEVISION	1979	7.9	6.2	5.5	5.1	3.9	4.9	4.9	8.7	10.0	10.2	11.4	21.3
	1978	10.0	6.5	5.2	4.7	3.5	3.4	5.4	5.3	7.9	9.7	16.2	22.2
TOTAL TELEVISION	1979	8.0	6.2	6.0	5.0	4.6	5.7	4.4	7.0	8.6	9.4	11.2	23.9
	1978	10.2	6.0	5.4	4.9	3.8	4.8	5.2	5.5	8.0	9.6	14.1	22.5
AIR CONDITIONERS (ROOM)	1979	0.3	0.2	1.3	4.5	12.7	24.3	34.9	13.8	5.2	1.8	0.9	0.1
	1978	0.2	0.9	1.2	6.0	14.3	27.1	35.8	10.6	2.1	0.8	0.2	0.8
DISHWASHERS	1979	5.2	6.8	4.2	5.4	12.8	7.1	4.7	5.3	7.6	6.1	13.8	21.0
	1978	4.0	4.3	4.1	6.5	8.1	7.4	5.9	6.8	7.9	14.3	10.9	19.8
DRYERS	1979	10.6	7.3	7.8	6.9	6.3	5.6	5.3	6.1	11.8	12.8	11.3	8.2
	1978	7.7	9.5	5.8	7.0	6.7	6.3	7.0	7.4	9.7	10.7	11.6	10.6
FREEZERS	1979	7.0	3.7	2.8	3.8	9.2	17.0	15.0	12.4	8.9	6.3	8.2	5.7
	1978	4.6	5.6	7.8	5.9	6.1	9.4	9.3	13.1	8.7	11.6	10.4	7.5
MICROWAVE OVENS	1979	7.2	2.6	2.7	1.9	7.1	2.6	2.9	2.5	4.7	7.9	16.9	41.0
	1978	3.8	2.3	3.8	5.8	5.2	4.0	3.4	2.3	4.1	6.3	20.3	38.7
RANGES	1979	7.0	5.8	6.9	5.9	6.7	10.6	6.8	5.8	7.5	11.0	14.3	11.7
	1978	8.1	7.3	5.5	6.6	9.2	7.0	6.8	7.9	9.0	10.0	10.2	12.4
REFRIGERATORS	1979	5.4	4.8	6.4	6.0	9.4	13.9	13.9	13.2	7.2	6.1	7.0	6.7
	1978	8.4	7.6	4.4	5.4	12.2	9.4	11.4	9.9	5.8	10.0	8.3	7.2
WASHERS	1979	9.9	6.0	8.1	6.7	7.3	7.8	6.3	7.6	12.4	9.7	9.1	9.1
	1978	8.0	8.6	7.1	7.4	7.3	7.3	7.4	8.5	10.0	9.3	10.5	8.6

RETAIL SALES PATTERNS (continued)

Percentage of Annual Retail Sales, by Region/Month

The South

While television sales soared in November and December, sales of white goods were generally predictable here.

Television: Total television sales were pretty flat in the South for the first 11 months of 1979, then almost 25% of total annual sales were rung up in December.

Air conditioners: Here, too, most air conditioner sales were made in July; June took second place, May was third and August a close fourth.

Dryers: Dryer sales hit their stride in the fourth quarter, with November coming out on top with a 15.4% share.

Freezers: The monthly pattern for freezers held close to 1978 but business was steadier last year—neither the peaks nor valleys were as extreme as those noted a year earlier.

Microwave ovens: Through July microwave oven sales stayed under 5% each month. While a slight pick-up was noted in August, retail business didn't really take off for these items until November.

Refrigerators: June was the best month for refrigerator sales in the South last year. A year earlier they peaked in May.

Washers: November and December tied for the most washer sales in 1979, each registering a 12.2% share of the annual market. October followed with a 10.6% slice. In 1978, February registered the most washer sales in the South—12.4%.

PRODUCT		THE SOUTH Comprising the states of Alabama, Delaware, District of Columbia, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia & West Virginia.											
		JAN.	FEB.	MAR.	APR.	MAY	JUNE	JULY	AUG.	SEPT.	OCT.	NOV.	DEC.
B&W TELEVISION	1979	5.9	4.3	4.8	5.1	5.6	8.8	4.1	6.2	6.7	9.3	13.0	26.2
	1978	6.4	5.2	3.6	5.9	8.1	6.3	9.2	6.8	6.8	10.0	11.4	20.3
COLOR TELEVISION	1979	7.2	4.8	5.4	6.0	5.3	5.2	5.0	6.9	7.9	10.0	14.2	22.1
	1978	7.5	3.4	3.5	5.1	5.5	5.8	6.0	6.2	7.5	13.4	11.9	24.2
TOTAL TELEVISION	1979	6.5	4.6	5.1	5.5	5.4	7.1	4.5	6.5	7.3	9.6	13.6	24.3
	1978	7.0	4.3	3.6	5.5	6.8	6.0	7.6	6.5	7.2	11.7	11.6	22.2
AIR CONDITIONERS (ROOM)	1979	0.6	0.6	0.6	4.2	15.8	20.1	38.5	14.8	2.5	1.1	0.6	0.6
	1978	–	–	1.2	2.6	12.5	24.5	33.7	17.5	6.4	0.6	0.8	0.2
DISHWASHERS	1979	4.4	4.1	7.6	6.0	7.0	7.8	10.3	8.0	9.6	9.2	9.5	16.5
	1978	4.7	3.2	6.6	7.0	7.0	4.8	3.1	6.6	11.9	10.1	16.6	18.4
DRYERS	1979	6.2	5.6	4.6	6.5	6.3	6.9	6.8	7.4	8.2	10.8	15.4	15.3
	1978	9.7	9.3	10.3	13.4	6.0	3.0	5.3	5.3	5.6	5.9	7.6	18.6
FREEZERS	1979	3.5	2.9	4.0	7.2	8.7	16.9	13.3	10.3	8.5	8.1	9.8	6.8
	1978	2.7	1.6	3.5	4.0	19.8	25.4	14.9	11.3	7.4	2.2	5.0	2.2
MICROWAVE OVENS	1979	4.8	4.3	2.4	4.3	4.6	3.5	2.4	6.8	7.1	6.1	13.8	39.9
	1978	11.2	2.7	2.9	3.2	3.3	2.7	2.9	2.0	3.1	9.1	16.0	40.9
RANGES	1979	4.6	4.1	5.7	8.9	6.7	7.6	5.4	6.9	11.0	14.3	12.0	12.8
	1978	6.8	4.7	6.7	11.9	8.7	8.4	8.6	7.0	11.4	8.3	9.4	8.1
REFRIGERATORS	1979	3.9	3.6	6.0	8.2	10.7	13.2	10.1	11.1	9.8	7.2	8.0	8.2
	1978	4.0	4.8	5.4	10.8	14.5	11.3	9.4	10.9	11.9	7.3	5.4	4.3
WASHERS	1979	6.3	5.4	5.3	6.9	7.6	9.8	7.3	8.6	7.8	10.6	12.2	12.2
	1978	9.2	12.4	8.0	8.9	6.9	6.6	4.8	5.5	7.1	10.7	8.7	11.2

The Southwest

Except for months beginning with "A"—April and August—every one registered a win, place and/or show last year for tv/appliance dealers in the Southwest.

Television: While color television sales were definitely a fourth-quarter affair, building to a December crescendo, b/w set sales peaked in November, with December and September ranking second and third.

Air conditioners: In January and February and for the entire fourth quarter, air conditioners didn't sell here. June and July shared top honors each with a 30% share of total annual sales.

Dryers: February was number three for most dryer sales in the Southwest in 1979. The lowest levels—but still 5% or better—were reached from May through September.

Freezers: Freezer sales peaked in May at 21.7%. While June followed with a 16.7% share, in third place was September, chalking up 13.3% of the annual sales total.

Microwave ovens: While December registered most of the microwave oven sales in the area—44%—and September followed way behind at 16.7%. May took third place with a 13.3% share.

Ranges: Sales of ranges peaked in January—quite a shift from 1978.

Refrigerators: The largest number of refrigerator sales were posted for July; September was number two and December in the third spot.

Washers: Most washer sales were recorded in January.

PRODUCT		THE SOUTHWEST Comprising the states of Arizona, Arkansas, Louisiana, New Mexico, Oklahoma & Texas.											
		JAN.	FEB.	MAR.	APR.	MAY	JUNE	JULY	AUG.	SEPT.	OCT.	NOV.	DEC.
B&W TELEVISION	1979	5.2	5.8	5.2	3.8	4.6	4.0	3.2	5.2	8.2	7.4	28.2	19.2
	1978	4.8	3.6	3.8	5.8	5.6	4.9	6.4	7.9	4.5	8.0	21.8	22.8
COLOR TELEVISION	1979	8.2	6.4	5.4	5.8	6.2	4.8	4.4	7.0	7.8	12.2	12.8	19.0
	1978	8.0	5.6	4.4	5.3	6.7	5.3	7.1	7.3	11.0	7.1	14.1	18.1
TOTAL TELEVISION	1979	6.7	6.1	5.3	4.8	5.4	4.4	3.8	6.1	8.0	9.8	20.5	19.1
	1978	6.4	4.6	4.1	5.6	6.2	5.1	6.8	7.6	7.8	7.6	17.9	20.3
AIR CONDITIONERS (ROOM)	1979	0.0	0.0	0.7	9.3	18.4	30.0	30.0	8.3	3.3	0.0	0.0	0.0
	1978	–	0.7	0.7	3.0	15.2	30.9	30.2	15.0	3.0	0.7	0.3	0.3
DISHWASHERS	1979	8.5	8.0	7.5	5.5	5.0	3.5	8.0	3.5	11.0	8.0	11.5	20.0
	1978	5.0	4.2	5.5	4.3	9.2	13.8	15.2	11.8	9.0	4.5	6.0	11.5
DRYERS	1979	9.7	10.7	7.7	8.0	5.0	6.0	5.6	5.3	6.7	9.3	12.7	13.3
	1978	11.2	8.8	6.8	3.2	4.8	6.6	7.8	11.4	7.0	11.6	8.6	12.2
FREEZERS	1979	1.7	1.7	2.6	4.0	21.7	16.7	11.7	11.7	13.3	9.3	2.3	3.3
	1978	5.3	5.8	2.7	9.0	9.0	12.2	11.5	1.5	5.3	28.7	5.0	4.0
MICROWAVE OVENS	1979	5.7	1.0	0.6	3.7	13.3	0.6	1.0	4.7	3.0	5.7	16.7	44.0
	1978	9.0	3.4	4.2	2.2	14.6	4.6	2.4	4.4	3.4	4.4	17.8	29.6
RANGES	1979	12.0	9.5	8.5	4.5	4.5	7.5	6.0	7.5	8.5	10.0	11.0	10.5
	1978	4.7	5.5	3.5	3.5	8.2	3.1	16.7	5.5	10.5	3.1	16.2	19.5
REFRIGERATORS	1979	5.8	5.2	5.5	6.5	7.5	9.2	15.8	9.5	11.5	7.5	6.0	10.0
	1978	2.7	3.5	3.3	4.5	7.8	15.3	19.2	16.2	6.5	3.8	6.2	11.0
WASHERS	1979	12.3	6.5	10.0	8.3	6.5	7.5	8.5	6.7	6.7	9.0	8.3	9.7
	1978	9.8	7.9	7.8	5.1	6.6	7.8	8.0	10.0	7.2	9.5	9.6	10.7

RETAIL SALES PATTERNS (continued)

Percentage of Annual Retail Sales, by Region/Month

Far West

Second-half business was head and shoulders ahead of the first half in the Far West on all counts.

Television: Following the pattern set in most other parts of the country, color tv sales were highest in the fourth quarter. September was the third best month for b/w set sales.

Air conditioners: Sales for room air conditioners peaked in August and were not statistically significant in either November or December—a slight shift from 1978 when January started off at ground zero.

Dishwashers: November proved to be the strongest month for dishwasher sales in 1979. December followed with almost a 13% share and the rest of the year showed steady business—running from about 6% to 8%.

Dryers: Dryers started off the year with a healthy 12.7%—the second best figure—share of total annual sales.

Freezers: August was the high point for freezer sales in the Far West. July and August had the next largest shares.

Ranges: Sales of ranges peaked in November 6.6% above 1978's high, with the show spot shifting from September to April and place from July to September.

Refrigerators: The bulk of refrigerator sales were recorded in the third quarter. The low for the year went to February.

Washers: September, October and November, placed one, two and three for best-selling washer months. January tied with October in second place. •

PRODUCTS		THE FAR WEST Comprising the states of Alaska, California, Colorado, Hawaii, Idaho, Montana, Nevada, Oregon, Utah, Washington & Wyoming.											
		JAN.	FEB.	MAR.	APR.	MAY	JUNE	JULY	AUG.	SEPT.	OCT.	NOV.	DEC.
B&W TELEVISION	1979	7.6	6.4	5.1	6.4	7.0	7.7	6.8	5.9	8.4	6.0	13.9	18.8
	1978	5.0	3.7	4.3	5.5	4.3	2.7	3.2	5.7	15.5	9.7	12.5	27.9
COLOR TELEVISION	1979	9.7	7.1	5.7	3.9	4.2	5.3	5.6	8.3	8.9	10.7	13.2	17.4
	1978	6.7	5.1	3.4	5.3	5.0	6.1	4.1	8.3	12.7	11.6	12.4	19.3
TOTAL TELEVISION	1979	8.6	6.8	5.4	5.2	5.6	6.5	6.2	7.1	8.7	8.3	13.5	18.1
	1978	5.8	4.5	3.9	5.4	4.6	4.4	3.7	7.0	14.1	10.6	12.4	23.6
AIR CONDITIONERS	1979	1.6	1.2	2.2	7.0	11.8	14.4	23.0	29.0	8.6	1.2	0.0	0.0
(ROOM)	1978	–	1.2	2.2	1.8	6.2	21.2	38.5	21.8	1.8	1.8	2.0	1.5
DISHWASHERS	1979	6.2	5.6	8.8	7.6	5.4	6.2	8.2	8.2	6.0	8.6	16.4	12.8
	1978	4.5	7.8	3.8	3.8	10.5	9.0	6.0	9.0	8.7	9.7	9.7	17.5
DRYERS	1979	12.7	10.5	7.0	4.3	6.5	3.5	3.5	9.0	8.0	13.3	12.2	9.5
	1978	6.8	6.8	4.0	4.2	4.5	5.8	8.2	6.5	13.2	16.0	13.2	10.8
FREEZERS	1979	0.7	4.7	4.0	5.0	8.7	3.3	15.3	18.7	14.7	6.3	9.6	9.0
	1978	4.0	3.8	4.0	7.5	18.2	5.2	13.8	9.5	25.0	3.8	3.0	2.2
MICROWAVE OVENS	1979	4.0	4.0	3.4	3.1	7.6	6.0	6.6	4.3	4.8	7.6	17.9	30.7
	1978	3.7	3.2	2.8	3.3	3.7	7.0	13.5	9.2	5.8	6.5	11.8	29.5
RANGES	1979	6.4	7.1	5.2	10.4	8.6	6.1	7.4	6.8	7.2	9.0	17.8	8.0
	1978	6.3	7.3	6.0	7.7	8.0	7.3	8.0	8.0	10.0	7.7	11.7	12.0
REFRIGERATORS	1979	5.0	3.6	9.0	6.0	8.6	8.6	12.0	17.6	12.2	6.8	5.2	5.4
	1978	3.5	4.8	5.8	7.5	7.0	9.8	10.8	16.1	15.2	7.8	7.2	4.5
WASHERS	1979	12.0	7.4	7.2	6.0	5.8	5.4	5.8	7.0	12.4	12.0	11.0	8.0
	1978	7.6	7.2	6.8	6.3	6.6	7.8	7.8	7.4	10.4	12.0	10.7	9.4

MARKET PROFILES: Analysis:

Among the many measurements of economic activity nationally, regionally and state by state, *Merchandising* lists four—number of electrified homes, number of farm homes, housing starts and personal income—as indicators of sales potentials for hard goods merchants across the country. Of these, the first, second and fourth criteria are usually considered the most important for retailers.

As the chart on the following page shows, for the United States as a whole the number of residential/rural customers with wired homes increased in 1979 by 2.0%, housing starts dropped 5.4%, and personal income rose 12.5%.

Against this overall picture, the Sunbelt phenomenon again surpassed the national averages. Regionally, the South Atlantic and the West South Central registered the best results with increases in the number of wired homes, housing starts and personal income. The Mountain and Pacific regions bettered national averages in wired homes and personal income, while dropping behind them in housing starts.

Wired homes ahead

The number of electrified homes showed increases last year in all 50 states and the District of Columbia. Gains ranged from 0.6% in West Virginia to a high of 7.4% for Nevada. Leading states topping the national average in number of wired homes included Arizona, up 6.7%; Hawaii and Florida, up 4.8%; Utah, up 4.1%, Colorado, up 3.8%; and Washington, up 3.5%.

Housing starts

Despite the generally bleak picture presented by the downturn in housing starts, there were some bright spots. Biggest declines were reported for Alaska (minus 38.8%) and Montana (minus 35.5%). However, gainers included Hawaii, the leader, up 39.1%; followed by West Virginia, up 23.4%; Georgia, up 23.7%; Florida, up 22.2%; and Wyoming, up 21.9%.

Other states registering pluses rather than minuses in housing starts were Arkansas, New Jersey, New Mexico, North Carolina, South Carolina, South Dakota and Texas.

Personal income

Taking into account the double-digit inflation which hit many parts of the country last year, the all-important personal income figures showed their best gains regionally in the Mountain States (plus 17.5%), the Pacific (plus 14.3%), West South Central (plus 14.1%) and the South Atlantic (plus 13.2%). The other five regions scored increases but below the national average.

Twenty-four states and the District of Columbia recorded gains above the national average. Leaders in this group were Montana, up 21.7%; Arizona, up 20.5%; Kansas, up 18.3%; Washington, up 18.2%; Colorado, up 17.9%; New Mexico, up 16.3%; Nevada, up 16.1%; Utah, up 16.0%; and Florida and Nebraska, tied with a 15.2% gain.

Whether it's the increase in affluent consumers as demonstrated by the gains in personal income, or the potentials presented by upturns in housing starts and/or residential customers—these are the harbingers of better business for the retailer who positions himself in his market properly. Even the decrease in housing starts may spell greater opportunities for replacement sales, as long as would-be customers have the income.

In any event, a careful and thoughtful reading of the chart on the next page, can be worthwhile for the retailer who seeks to better his business this year. •

MARKET PROFILES

Sales Potential by Geographical Region

REGIONS	RESIDENTIAL AND RURAL-CUSTOMERS (Projected From 10 Mos.)		FARM-RESIDENTIAL CUSTOMERS (1)		AUTHORIZED HOUSING STARTS(2) (Projected From 10 Mos.)		PERSONAL INCOME 10 MONTHS 1979(3) (IN MILLIONS OF DOLLARS)	
	NUMBER	% CHANGE (1979/1978)	NUMBER	% CHANGE (1979/1978)	NUMBER	% CHANGE (1979/1978)	NUMBER	% CHANGE (1979/1978)
NEW ENGLAND:								
TOTAL	**4,387,139**	+1.2	**25,260**	–6.6	**53,139**	–5.1	**91,194**	+11.9
CONNECTICUT	1,108,178	+1.3	3,550	–10.1	14,178	–4.6	25,939	+12.2
MAINE	459,998	+0.9	7,500	N.C.	3,998	–18.0	6,417	+11.9
MASSACHUSETTS	1,937,721	+1.0	4,750	–9.5	19,721	–2.9	43,613	+11.6
NEW HAMPSHIRE	353,961	+2.0	2,950	–0.8	6,961	–1.7	5,779	+11.4
RHODE ISLAND	327,012	+1.6	660	–9.6	5,012	–8.5	6,451	+12.0
VERMONT	200,269	+1.7	5,850	–12.0	3,269	–2.4	2,995	+14.8
MIDDLE ATLANTIC:								
TOTAL	**12,295,331**	+1.0	**110,450**	–18.8	**119,331**	–4.0	**283,396**	+11.5
NEW JERSEY	2,503,770	+1.5	7,500	–8.5	36,770	+7.6	59,215	+10.4
NEW YORK	5,647,916	+0.7	44,550	–21.1	39,916	–3.3	138,518	+11.8
PENNSYLVANIA	4,143,645	+1.0	58,400	–18.1	42,645	–12.7	85,663	+11.7
SOUTH ATLANTIC:								
TOTAL	**13,135,694**	+2.9	**316,900**	–14.6	**366,694**	+11.9	**232,550**	+13.2
DELAWARE	212,775	+1.3	2,950	–14.5	2,775	–12.7	4,664	+13.6
DISTRICT OF COLUMBIA	165,698	+1.0	–	–	1,698	–20.6	6,234	+14.6
FLORIDA	3,903,052	+4.8	34,650	–9.1	180,052	+22.2	59,766	+15.2
GEORGIA	1,912,761	+2.3	53,450	–21.7	42,761	+23.7	31,473	+12.5
MARYLAND	1,325,041	+2.0	15,850	–8.1	26,041	–8.1	31,043	+9.3
NORTH CAROLINA	2,100,351	+1.9	98,000	–13.9	39,351	+10.2	34,696	+14.7
SOUTH CAROLINA	1,068,733	+2.4	34,450	–22.2	24,733	+12.2	16,698	+12.1
VIRGINIA	1,760,156	+2.6	58,400	–3.2	45,156	–11.5	36,565	+12.5
WEST VIRGINIA	687,127	+0.6	19,150	–25.1	4,127	+23.4	11,411	+13.0
EAST NORTH CENTRAL:								
TOTAL	**14,910,068**	+1.4	**446,000**	–8.2	**201,068**	–19.6	**302,104**	+10.2
ILLINOIS	4,024,520	+1.1	105,950	–8.6	45,520	–33.2	87,605	+10.9
INDIANA	1,957,133	+1.6	88,100	–6.3	30,133	–10.7	37,562	+11.0
MICHIGAN	3,344,979	+1.5	62,350	–12.6	49,979	–13.1	67,278	+7.6
OHIO	3,838,645	+1.3	95,550	–10.2	48,645	–15.5	76,684	+10.9
WISCONSIN	1,744,791	+1.6	94,050	–4.0	26,791	–19.5	32,975	+11.0
EAST SOUTH CENTRAL:								
TOTAL	**5,180,402**	+1.2	**295,900**	–21.5	**63,402**	–11.6	**81,029**	+11.8
ALABAMA	1,420,656	+1.3	55,450	–26.3	18,656	–10.3	21,932	+12.9
KENTUCKY	1,265,559	+1.1	95,050	–18.0	13,559	–12.9	21,530	+10.8
MISSISSIPPI	852,846	+1.1	52,350	–32.1	8,846	–4.4	12,215	+11.5
TENNESSEE	1,641,341	+1.4	93,050	–14.6	22,341	–14.5	25,352	+10.5
WEST SOUTH CENTRAL:								
TOTAL	**7,981,301**	+2.5	**318,950**	–17.3	**196,301**	+7.2	**148,252**	+14.1
ARKANSAS	842,358	+1.1	57,350	–14.7	9,358	+2.5	12,209	+11.2
LOUISIANA	1,426,428	+1.5	34,650	–18.6	21,428	–7.5	24,170	+13.6
OKLAHOMA	1,155,894	+1.7	72,100	–14.2	18,894	–8.8	18,835	+13.9
TEXAS	4,556,621	+3.3	154,850	–19.3	146,621	+12.7	93,038	+14.7
WEST NORTH CENTRAL:								
TOTAL	**6,385,928**	+1.5	**553,950**	–7.1	**93,928**	–18.6	**118,866**	+11.9
IOWA	1,093,036	+1.2	119,800	–5.5	13,036	–18.5	20,982	+14.0
KANSAS	894,896	+1.5	71,000	–5.3	12,896	–13.7	17,984	+18.3
MINNESOTA	1,464,524	+2.1	102,950	–8.8	29,524	–17.9	28,070	+7.8
MISSOURI	1,850,328	+1.1	116,700	–11.3	20,328	–25.4	32,389	+10.6
NEBRASKA	585,272	+1.6	62,300	–7.4	9,272	–18.1	11,019	+15.2
NORTH DAKOTA	238,675	+2.0	40,300	–1.2	4,675	–19.6	4,313	+13.9
SOUTH DAKOTA	259,197	+1.7	40,900	–3.2	4,197	+4.0	4,109	+4.0
MOUNTAIN: TOTAL	**3,931,174**	+4.3	**106,400**	–9.8	**163,174**	–8.3	**72,460**	+17.5
ARIZONA	902,767	+6.7	5,000	–12.3	56,767	–6.1	16,513	+20.5
COLORADO	1,070,347	+3.8	26,100	–8.6	39,347	–7.7	20,628	+17.9
IDAHO	345,408	+2.5	23,050	–13.5	8,408	–3.2	5,455	+11.2
MONTANA	302,132	+1.1	21,250	–5.4	3,132	–35.5	5,457	+21.7
NEVADA	287,907	+7.4	1,800	–5.3	19,907	–16.8	5,535	+16.1
NEW MEXICO	413,136	+3.3	10,100	–12.6	13,136	+2.0	7,697	+16.3
UTAH	438,072	+4.1	12,000	–9.1	17,072	–15.2	7,957	+16.0
WYOMING	171,405	+3.3	7,100	–10.1	5,405	+21.9	3,218	+13.3
PACIFIC: TOTAL	**11,191,532**	+2.9	**125,390**	–15.3	**311,532**	–11.6	**241,038**	+14.3
ALASKA	121,921	+2.5	290	–3.3	2,921	–38.8	3,631	–1.7
CALIFORNIA	8,292,559	+2.7	59,400	–20.0	214,559	–11.3	181,527	+14.1
HAWAII	255,756	+4.8	3,350	–9.5	11,756	+39.1	7,135	+13.4
OREGON	997,167	+3.1	29,700	–11.7	30,167	–19.9	17,849	+13.8
WASHINGTON	1,524,129	+3.5	32,650	–9.7	52,129	–12.4	30,896	+18.2
THE NATION	**79,398,569**	**+2.0**	**2,299,200**	**–13.1**	**1,568,569**	**–5.4**	**1,570,889**	**+12.5**

SOURCES: (1)U.S. Dept. of Agriculture; (2)U.S. Dept. of Commerce; (3)Business Week

RETAIL REPLACEMENT SALES SURVEY

New Owners vs. Replacement Purchasers: Average Selling Price

Analysis:

Replacement sales were down for the most part last year, according to a random sampling of the nation's retailers. Declines ranged from two points (to 39%) in room air conditioners to a whopping 46 points (to 28%) in console stereo.

Laundry products (washers and dryers), microwave ovens, built-in and smoothtop electric ranges, and both built-in and free-standing gas ranges were the exceptions. The upturn in built-in appliance replacement sales, at least, may be explained by the increasing consumer decision to improve existing homes rather than facing the new home market with its growing shortage of mortgages even at sharply higher interest rates.

In overall terms, regardless of changes from 1978, replacement activity in 1979 was highest in built-in gas ranges (78%) and free-standing gas ranges (77%), followed by clothes washers (76%). Leader among the home electronics products was color television with 68%.

Average prices increase

Average retail prices were up generally (to no one's surprise), reflecting the pervasive impact of inflation, as well as continuing consumer preference for the more fully-featured, higher-end models. The average tag of component hifi systems, however, was one of the few exceptions, down by $66, an indication of the more intense price promotional effort caused by the softness of hifi business.

Results of this year's survey on replacement business by type of outlet were inconclusive and the statistical breakdown is not being published. •

1979 ALL RETAIL OUTLETS

PRODUCTS SOLD:	TYPE OF SALE		AVERAGE PRICE
AUDIO/VIDEO:	% REPLACED	% NEW	
B&W TV	53	47	123
COLOR TV	68	32	552
COMPACT STEREO	26	74	264
COMPONENT HIFI	34	66	411
CONSOLE STEREO	28	72	365
MAJOR APPLIANCES:			
AIR CONDITIONERS, ROOM	39	61	336
DISHWASHERS	54	46	355
DISPOSERS, FOOD WASTE	56	44	100
DRYERS	68	32	269
FREEZERS	45	55	364
MICROWAVE OVENS	12	88	451
RANGES, ELECTRIC TOTAL	60	40	463
BUILT-IN	42	58	397
FREE STANDING	68	32	419
SMOOTHTOP	55	45	632
RANGES, GAS TOTAL	77	23	373
BUILT-IN	78	22	342
FREE STANDING	77	23	385
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TRASH COMPACTORS	3	97	316
WASHERS	76	24	350

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Merchandising's TOP 50

	Last month's position	Months on chart
1. The Godfather	1	8
2. Saturday Night Fever	3	8
3. M*A*S*H	4	17
4. The Godfather II	2	5
5. Superman (new)	N	1
6. The Sound of Music	5	12
7. Patton	6	17
8. Butch Cassidy & the Sundance Kid	7	5
9. French Connection	19	17
10. Death Wish	14	2
11. Chinatown	12	2
12. The Graduate	13	14
13. Marathon Man	16	4
14. Murder on the Orient Express	17	5
15. Barbarella	25	5
16. Harold and Maude	N	1
17. Pretty Baby	23	2
18. The Lion in Winter	32	12
19. The Deep	N	1
20. The Longest Day	34	17
21. The Longest Yard	8	2
22. Carnal Knowledge	20	14
23. The Adventures of Sherlock Holmes' Smarter Brother	26	3
24. Looking for Mr. Goodbar	9	5
25. The King & I	35	17
26. The African Queen	11	8
27. Tora! Tora! Tora!	24	17
28. Hello Dolly	27	17
29. Night of the Living Dead	36	9
30. Wild Geese	21	13
31. King Kong (new)	15	3
32. The Man Who Would Be King	N	15
33. Nashville	22	3
34. A Touch of Class	28	8
35. Papillon	29	15
36. Citizen Kane	10	15
37. King Kong (old)	30	14
38. Love Story	40	4
39. Bruce Lee—Super Dragon	42	15
40. The Shootist	31	2
41. Paper Chase	45	15
42. In Praise of Older Women	39	3
43. Mighty Mouse	33	14
44. The Sailor Who Fell From Grace With the Sea	44	12
45. Those Magnificent Men in Their Flying Machines	N	14
46. Tunnel Vision	18	9
47. A Man and a Woman	46	13
48. Fantastic Voyage	N	16
49. Fantastic Animation Festival	47	5
50. Flash Gordon Conquers the Universe	N	5